CAREER & TECHNOLOGY STUDIES

MANAGEMENT & MARKETING

GUIDE TO STANDARDS AND IMPLEMENTATION

INTERIM 1995
(SEPTEMBER 1995 - SEPTEMBER 1997)

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MAY 1995

Alberta
EDUCATION
CURRICULUM STANDARDS BRANCH

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This document was prep

Administrators	
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Parents	
Students	
Teachers	✓

Program/Level: Career and Technology Studies/Secondary

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NOTE: Shaded areas within this document have been approved for optional implementation. Assessment conditions and criteria are in draft form and will be validated 1994–97.

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CAREER AND TECHNOLOGY STUDIES

PROGRAM PHILOSOPHY/RATIONALE

Through Career and Technology Studies (CTS), secondary education in Alberta is responding to the many challenges of modern society, helping young people develop daily living skills, and nurturing a flexible, well-qualified work force.

In Canada's information society, characterized by rapid change in the social and economic environment, students must be confident in their ability to respond to change and successfully meet the challenges they face in their own personal and work lives. In particular, they must make decisions about what they will do when they finish high school. Many students will enter the work force, others will continue their education. All students face the challenges of growing independence and responsibility, and of entering the highly competitive workplace and/or post-secondary programs.

Secondary schools also face challenges. They must deliver, on a consistent basis, high quality, cost-effective programs that students, parents and community find credible and relevant.

CTS helps schools and students meet these challenges. Schools can respond more efficiently and effectively to student and community needs and expectations by using the opportunities in the CTS curriculum to design courses and access school, community and distance learning resources. Students can develop the confidence they need as they move into adult roles by assuming increased responsibility for their learning; cultivating their individual talents, interests and abilities; and defining and acting on their goals.

As an important component of basic education in Alberta secondary schools, CTS promotes students' achievement by setting clear expectations and recognizing students' success. Students in CTS develop competencies—that is, the knowledge, skills and attitudes students must demonstrate, or what they know and can do.

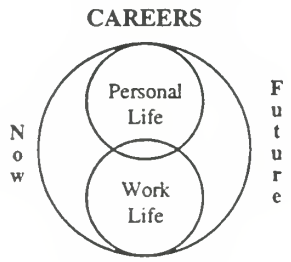
These competencies can be applied now and in the future as students make a smooth transition into adult roles in the family, community, workplace and/or further education. To help ensure this transition for students, clearly stated expectations and standards have been defined with the assistance of teachers, business and industry representatives and post-secondary educators.

CTS offers *all* students important learning opportunities. Regardless of the particular area of study chosen, students in CTS will:

- develop skills that they can apply in their daily lives now and in the future
- refine career-planning skills
- develop technology-related skills
- enhance employability skills

- apply and reinforce learnings developed in other subject areas.

In CTS, students build skills they can apply in their everyday lives. For example, in the CTS program, particularly at the introductory levels, students have the opportunity to improve their ability to make sound consumer decisions, and to appreciate environmental and safety precautions.

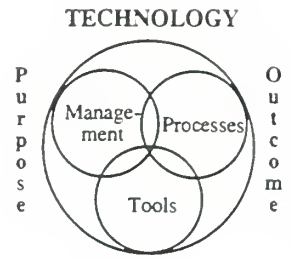


A career encompasses more than activities related to a person's job or occupation; it involves one's personal life in both local and global contexts; e.g., as a family member, a friend, a community volunteer, a citizen.

The integration of careers throughout the CTS program helps students make effective career decisions and target their efforts. Students in CTS will have the opportunity to expand their knowledge about careers, occupations and job opportunities and the education and/or training requirements involved. As well, they will recognize the need for lifelong learning.

Students in CTS will have the opportunity to use and apply technology and systems effectively and efficiently, which involves:

- a decision regarding which processes and procedures best suit the task at hand
- the appropriate selection and skilled use of the tools or resources that are available
- an assessment of and management of the impact the use of the technology may have on themselves, on others and on the environment.



Integrated throughout CTS are employability skills, those basic competencies that help students develop their personal management and social skills. Personal management skills are improved as students take increased responsibility for their learning, design innovative solutions to problems or challenges, and manage resources effectively and efficiently. Students' social skills improve through learning experiences that require them to work effectively with others, demonstrate teamwork and leadership, and maintain high standards in safety and accountability.

Further enhancing the employability skills, CTS reinforces and enhances learnings developed in core and other complementary courses. The curriculum emphasizes, as appropriate, the effective application of communication and numeracy skills.

Finally, in addition to the common outcomes described above, those students who focus on a particular area of study will develop career-specific competencies that support entry into the workplace and/or related post-secondary programs. Career-specific competencies can involve understanding and applying appropriate terminology, processes and technologies related to a specific career, occupation or job.

GENERAL LEARNER EXPECTATIONS

General learner expectations describe the basic competencies that are integrated throughout the CTS program.

Within an applied context that is relevant to personal goals, aptitudes and abilities, the student in Career and Technology Studies will:

- demonstrate the basic knowledge, skills and attitudes necessary for achievement and fulfillment in personal life
- develop an action plan that relates personal interests, abilities and aptitudes to career opportunities and requirements
- use technology effectively, linking and applying available tools, management and processes to produce a desired outcome
- develop personal management skills by:
  - linking theory and practice, using resources, tools, technology and processes responsibly and efficiently (managing learning)
  - applying effective and innovative decision-making and problem-solving strategies in the design, production, marketing and consumption of goods and services (being innovative)
  - selecting relevant, goal-related activities, ranking them in order of importance, allocating necessary time, and preparing and following schedules (managing resources)
- improve social interaction skills by:
  - demonstrating flexibility and cooperative work and communication behaviors (working with others)
  - participating as a team member by working cooperatively with others and contributing to the group with ideas, suggestions and effort (teamwork and leadership)
  - demonstrating high standards of diligence, attendance and punctuality, following safe procedures consistently, and recognizing and eliminating potential hazards (demonstrating responsibility)
- demonstrate appropriate verbal, written, composition, summarization and presentation skills
- use basic computation and measurement principles accurately and efficiently.

PROGRAM ORGANIZATION

CURRICULUM STRUCTURE

Career and Technology Studies is organized into *strands* and *modules.*

Strands in CTS define competencies that help students:

- build daily living skills
- investigate career options
- use technology (managing, processes, tools) effectively and efficiently
- prepare for entry into the workplace and/or related post-secondary programs.

In general, strands relate to selected industry sectors that offer positive occupational opportunities for students. Some occupational opportunities require further education after high school, and some allow direct entry into the workplace. The industry sectors encompass both goods-producing industries, such as agriculture, manufacturing and construction, and service-producing industries, such as business services, health services, and finance and insurance services.

Modules are the building blocks for each strand. They define what a student is expected to know and be able to do (exit-level *competencies*). Modules also specify prerequisites and facility and instructional parameters, where necessary.

The competencies a student must demonstrate to achieve success in a module are defined through the *module learner expectations.* Senior high school students who can demonstrate the module learner expectations (i.e., have the designated competencies) will qualify for one credit towards their high school diploma.

Module learner expectations are a culmination of the *specific learner expectations*, which provide a more detailed framework for instruction. They define the scope and depth of knowledge, skills and attitudes the student should acquire.

The following chart shows the 21 strands that comprise the CTS program and the number of modules available in each strand.

Strand	No. of Modules
1. Agriculture	31
2. Career Transitions	23
3. Communication Technology	32
4. *Community Health*	*25**
5. Construction Technologies	46
6. Cosmetology	58
7. Design Studies	31
8. *Electro-Technologies*	*33**
9. Energy and Mines	27
10. Enterprise and Innovation	8
11. Fabrication Studies	41
12. Fashion Studies	29
13. Financial Management	15
14. Foods	37
15. Forestry	21
16. Information Processing	43
17. Legal Studies	13
18. Management and Marketing	21
19. Mechanics	53
20. Tourism Studies	24
21. Wildlife	17

*Estimate

Note: *As of September 1995, 19 of the 21 strands are available for optional implementation in Alberta junior and high schools. The remaining strands, indicated above in italics, will be phased in from September 1995 to September 1996. Provincial implementation of all strands is scheduled for September 1997.*

LEVELS OF ACHIEVEMENT

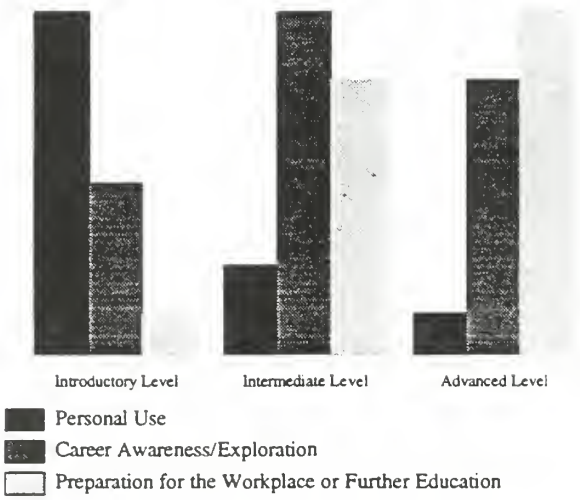
Modules are organized into three levels of achievement: introductory, intermediate and advanced. As students progress through the levels, they will be expected to meet higher standards and demonstrate increased degree of competence, both in the general learner expectations and the module learner expectations.

Introductory level modules help students build daily living skills and form the basis for further learning. Introductory modules are developed for students who have no previous experience in the strand.

Intermediate level modules build on the competencies developed at the introductory level. They provide a broader perspective, helping students recognize the wide range of related career opportunities available within the strand.

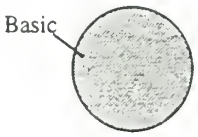
Advanced level modules demand a higher level of expertise and help prepare students for entry into the workplace or a related post-secondary program.

The following illustrates the relative emphasis on the aspects of career planning at each of the levels.



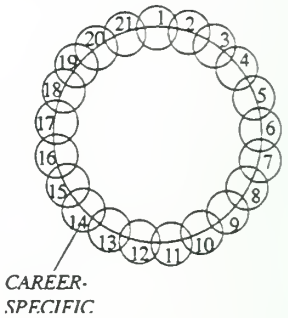
TYPES OF COMPETENCE

Two types of competence are defined within the CTS program: basic and career-specific.



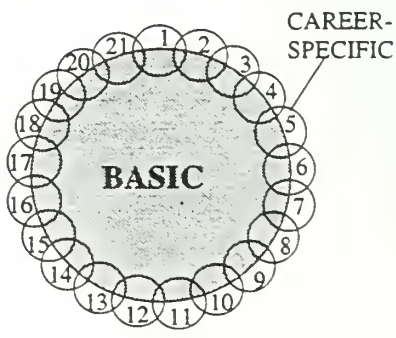
Basic Competencies are generic to any career area and are developed within each module. Basic competencies include:

- personal management; e.g., managing learning, being innovative, ethics, managing resources
- social; e.g., communication, teamwork, leadership and service, and demonstrating responsibility (safety and accountability).



Career-specific Competencies relate to a particular strand. These competencies build daily living skills at the introductory levels and support the smooth transition to the workplace and/or post-secondary programs at the intermediate and advanced levels.

The following model shows the relationship of these two types of competencies within the 21 strands of CTS (numbers refer to the chart on page A.5):



CURRICULUM AND ASSESSMENT STANDARDS

CURRICULUM STANDARDS

Curriculum standards in CTS define what students must know and be able do. Curriculum standards are expressed through general learner expectations for CTS, and through module and specific learner expectations for each strand.

ASSESSMENT STANDARDS

Assessment standards define how the student's performance will be judged. In CTS, each assessment standards defines the conditions and criteria to be used for assessing the competencies defined in each module learner expectation. Students must fully meet each assessment standard, including all of the criteria and conditions defined for the module. Assessment standards are in draft form, as are tools and weightings, and will be validated 1994–97.

Teachers throughout the province will be able to ensure students receive a fair and reliable assessment. Students will use the assessment standards to guide their efforts, ensuring they participate more effectively and successfully in the learning and assessment process. Standards at advanced levels are as much as possible linked to workplace and post-secondary entry-level requirements.

The following pages describe the Management and Marketing strand in the Career and Technology Studies program.

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MANAGEMENT AND MARKETING

STRAND RATIONALE

In our highly competitive, rapidly changing society, management and marketing are generic skills. No matter what you do, you manage yourself or the resources available to you; you market yourself, your services or the products you make.

The Management and Marketing strand in Career and Technology Studies (CTS) is designed to increase students' ability to apply effective and efficient systems and strategies of management and marketing within personal, family, workplace, community and global contexts. Management identifies effective procedures for organizing resources and working with people. Marketing is concerned with pricing, promotion and the distribution of ideas, products and services to satisfy consumer needs and wants.

Marketing in this strand takes a retail perspective. Linking student experiences as consumers to marketing in the retail marketplace is a central focus in the marketing systems and strategies theme. Through consumer experiences and other business-like activities, students will be asked to focus on marketing through the eyes of a retail worker, manager or owner. The students will learn retail merchandising strategies that help people engaged in marketing meet the challenge of ensuring that the right goods or services are in the right place, at the right time, in the right quantity, at the right price and offered to the right people.

Management in this strand emphasizes *business* and *information* management within a competitive environment to generate profit. Knowledge, skills and attitudes will be developed to help students identify and analyze strategies to succeed when working within continuously changing systems. Students will gain experience and confidence through a wide range of practical experiences as they plan, organize, take action, lead, work cooperatively, monitor progress and communicate. Their goal will be to ensure quality and professional service.

This strand provides an opportunity for students to explore the very complex and continuously expanding study of management and marketing systems and strategies. The intent is to help students develop enough background and skill so that, as entry-level employees, they can make an effective contribution right away. Many of the systems and strategies introduced here lead to further learning and specialization, both through workplace experiences or post-secondary study.

Management and Marketing builds on Enterprise and Innovation competencies. Learning experiences will help students relate what they already know about how organizations run, how goods are sold and how the economy works. This strand can help students become aware of and assess a wide range of career opportunities — opportunities in small, medium and large public or private organizations as management and marketing specialists, in related support positions, or as a complement to the technical skills required by people who own and manage their own businesses.

Within the philosophy of Career and Technology Studies, students in Management and Marketing *will*:

- identify, analyze, apply and improve systems and strategies related to business and information management and marketing that can be applied personally, throughout CTS and in other study areas
- develop abilities in planning, organizing, acting, leading, monitoring and communicating
- research, analyze, interpret and evaluate information needed in business management, marketing and information management systems and strategies
- develop and apply creative problem-solving and effective decision-making skills within the contexts of business management, marketing and information management systems and strategies
- analyze the role of the individual, family and community as they relate to management and marketing within the Canadian and global economy
- identify areas of interest and talent and relate these to career opportunities in business management and marketing
- demonstrate effort to develop basic competencies.

STRAND ORGANIZATION

The Management and Marketing curriculum development model, shown below, illustrates the linkages among the themes, integrating concepts and learning contexts.

THEMES

Management and Marketing has three major themes around which the curriculum has been developed. All involve identifying, assessing and improving systems and strategies that affect:

- Business management systems and strategies
- Marketing systems and strategies
- Information management.

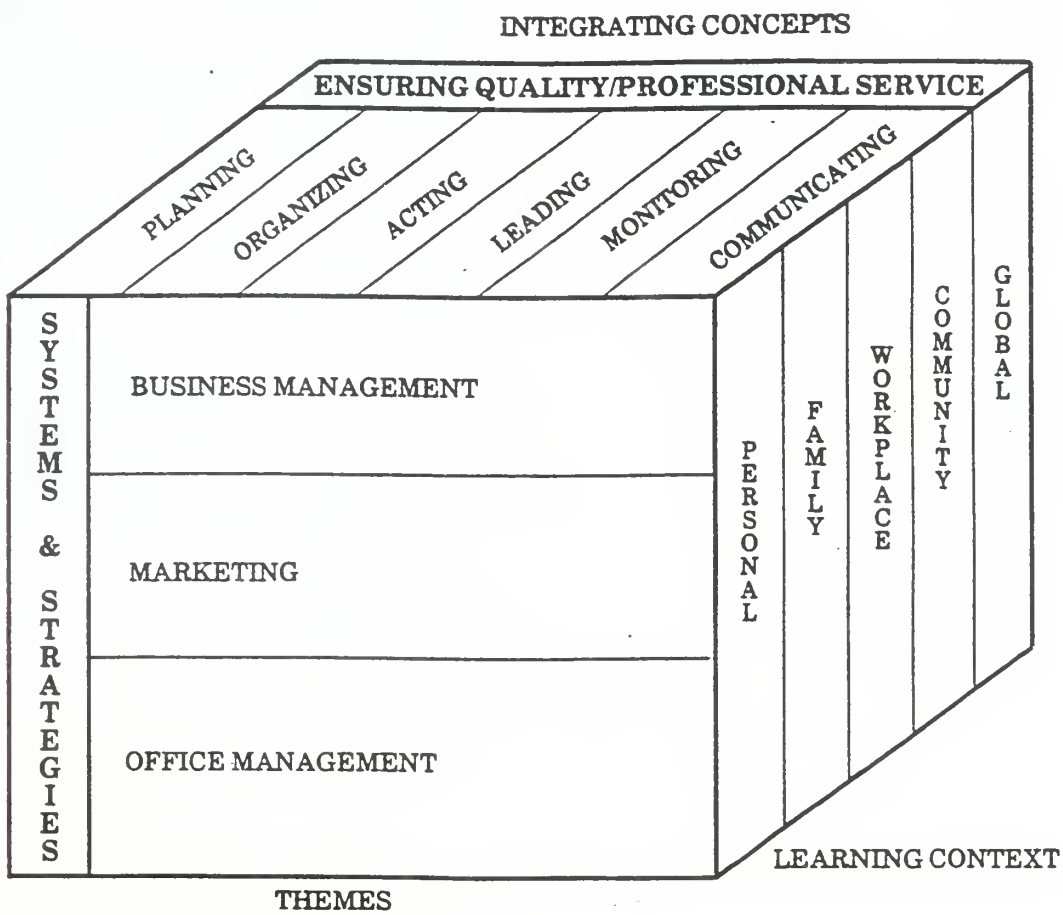
Career exploration will be reinforced throughout all themes. Students will identify personal interests and opportunities as they relate to careers in specific management and marketing areas.

INTEGRATING CONCEPTS

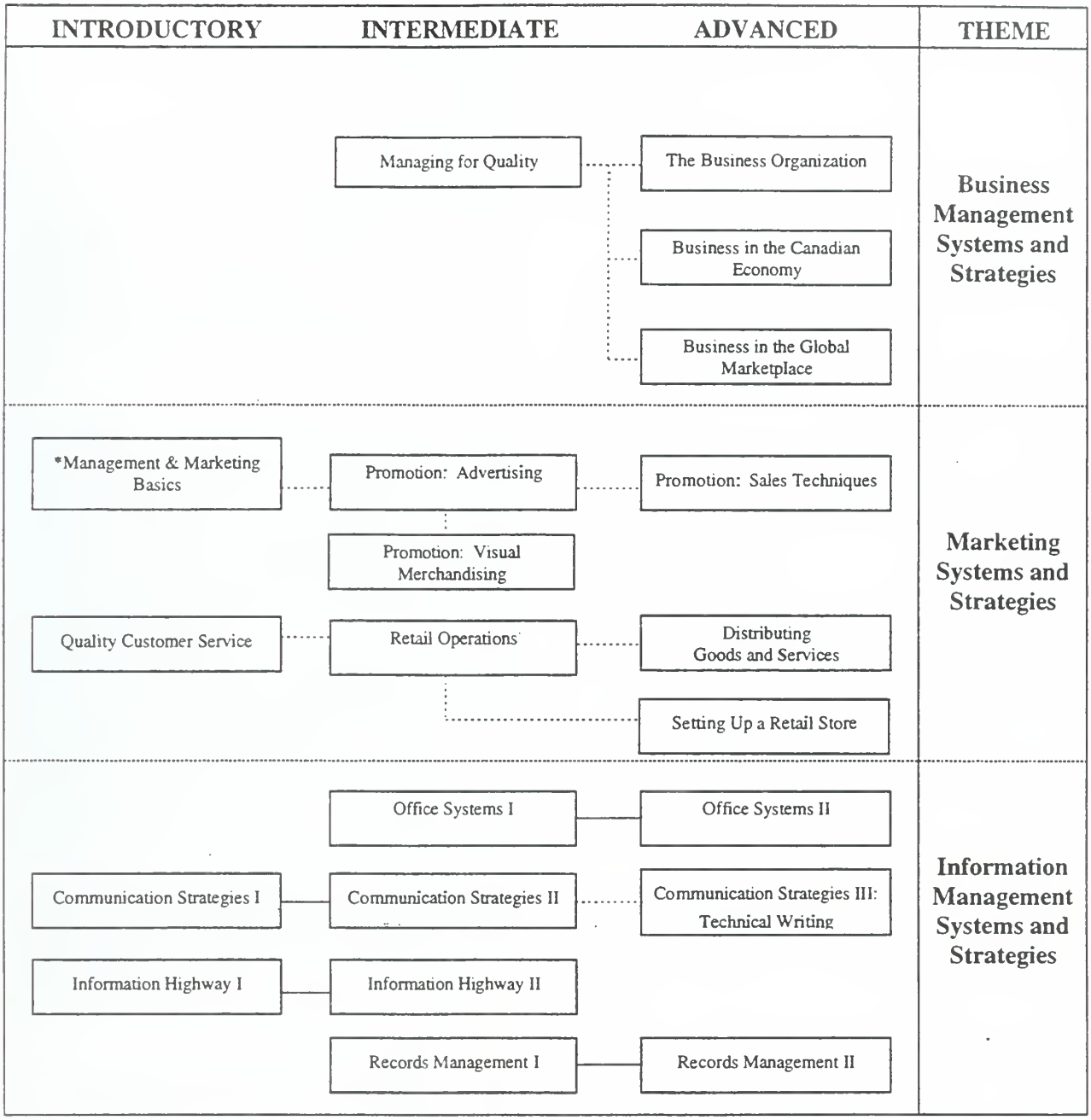
Integrating concepts are competencies that are reinforced throughout the modules. A continuing emphasis will be placed on applying principles of quality management and high standards of professional service. Students will be encouraged to develop their ability to plan, organize, take action, lead, work cooperatively, monitor, make adjustments and communicate effectively.

LEARNING CONTEXTS

Learning contexts provide a perspective for student learning. Using personal experience as the foundation, students will relate what they are learning to family, workplace, community and global experiences and perspectives.



SCOPE AND SEQUENCE — MANAGEMENT AND MARKETING



——— Prerequisite - - - - Recommended prerequisite or corequisite

* This module is a prerequisite to all modules in the business management and marketing themes

MODULE DESCRIPTIONS

Module M&M101: Management & Marketing Basics
All students have had experience with management and marketing in their everyday lives. This module introduces students to basic management and marketing concepts. An introduction to retailing and retail merchandising offers students an opportunity to change from being the customer to being the retail employee, manager or owner.

Module M&M102: Quality Customer Service
Serving the customer is an important function of marketing and affects the success of any retail organization. This module introduces students to the customer and the selling floor including sales and non-sales activities.

Module M&M103: Communication Strategies I
This module improves students' oral and written business communications skills necessary for efficient and effective management of information. The focus is on business writing strategies and composing at the computer when preparing memoranda, e-mail messages and business letters.

Module M&M104: Information Highway I
This module offers students an opportunity to develop personal-use skills in using bulletin board systems or the Internet for accessing and communicating data and information.

Module M&M201: Managing for Quality
The role and responsibilities of management are to coordinate all available resources to achieve quality results. This module provides an opportunity for students to develop basic managerial skills.

Module M&M202: Promotion: Advertising
The advertising process involves mass media communicating with a mass audience in order to establish a continuous recognition of a sponsor or product. This module is an introduction to communication channels, delivery strategies and advertising media that can be used to inform potential customers about products and services available in the marketplace.

Module M&M203: Promotion: Visual Merchandising
Visual merchandising helps to sell products at the point of purchase. Students become familiar with the different types of visual merchandising, how to construct attention-getting displays and what to look for when evaluating visual merchandising.

Module M&M204: Retail Operations
Policies and procedures for purchasing, receiving, stocking and selling goods are necessary in a retail store to ensure goods get onto the floor in the right quantity, at the right time and at the right price. Students look at retail operations that are typically performed off the selling floor, away from customers. The school store offers students an excellent on-site lab for most concepts in this module.

Module M&M205: Office Systems I
Today's office has access to technologies that enhance communication and support productivity. This module focuses on strategies and procedures in the office environment and managing processes and protocols related to electronic communication equipment and business travelling arrangements.

Module M&M206: Communication Strategies I
This module continues to improve students' basic oral and written communications strategies that are necessary for efficient, effective management of information. The focus is on technical writing strategies and composing at the computer when preparing informal business reports and proposals.

Module M&M207: Information Highway II
The Internet serves as the largest world accessible information and data communications computer network. This module assists students to develop efficient network skills in accessing and communicating information.

Module M&M208: Records Management I
Individuals and organizations need recorded information that is accurate, accessible and in the right format in order to make appropriate decisions. This module provides an opportunity to develop basic records management skills for a manual records system emphasizing alphabetical coding procedures.

Module M&M301: The Business Organization
Businesses today need to create a globally competitive environment to compete successfully in the marketplace. In this module, students explore organizational structure, management theories and organizations as working units. Students are encouraged to discuss and develop their own beliefs of what successful organizations might look like in the future.

Module M&M302: Business in the Canadian Economy
This module helps students expand and relate their knowledge of economics to how decisions are made in business within their communities, the province, nationally and internationally.

Module M&M303: Business in the Global Marketplace
Recent world economic and political changes have increased awareness of potential business opportunities abroad. This module introduces the opportunities and challenges that confront business people in establishing a global business operation.

Module M&M304: Promotion: Sales Techniques
Salespeople are needed throughout the marketing process. Personal selling is required to market various types of goods and services. In this module, students learn techniques for success in selling.

Module M&M305: Distributing Goods and Services
Having products and services at the right place when customers demand them is an essential component of the marketing mix. Students explore the channels of distribution and modes of transportation used to direct goods from the producer to the ultimate consumer.

Module M&M306: Setting Up a Retail Store
The image and location of a retail business is an important factor to its success. In this module, students develop store images, examine potential locations and design store layouts. Students should be given hands-on experience by researching a location for an actual retailing opportunity and designing a layout for this retail store. This module focuses on students owning a retail business and the necessary steps in setting up the establishment for success.

Module M&M307: Office Systems II
Students continue to demonstrate effective office environment strategies and processes and manage processes and protocols related to written communications transmittals and business meetings.

Module M&M308: Communication Strategies III: Technical Writing
This module continues to improve students' basic oral and written communications strategies that are necessary for efficient, effective management of information. The focus is on technical writing strategies and composing at the computer when preparing formal business reports and proposals.

Module M&M309: Records Management II
This module focuses on the advantages of an automated records system. Students who do not have database skills will require time to develop the skills to enter, edit, sort, search, select, format and print records. Numeric, subject and geographic coding are emphasized.

PLANNING FOR INSTRUCTION

CTS provides increased opportunity for junior and senior high schools to design courses based on the needs and interests of their students and the circumstances within the school and community. Some strands may be appropriately introduced at the junior high school level. Other strands are more appropriately introduced at the senior high school level or to Grade 9 students. Refer to page C.3 of this Guide for recommendations regarding the Management and Marketing strand, or the *CTS Manual for Administrators, Counsellors and Teachers* for a summary of the recommended grade levels for each strand.

PLANNING FOR CTS

Defining Courses

Schools determine which strands and modules will be offered in a particular school, and will combine modules into courses.

Each module was designed for approximately 25 hours of instruction. However, this time frame is only a guideline to facilitate planning. The CTS curricula are competency based, and the student may take more or less time to gain the designated competencies within each module.

A course will usually consist of modules primarily from the same strand but, where appropriate, may include modules from two or more strands. Refer to the *CTS Manual for Administrators, Counsellors and Teachers* for more information on course names and course codes.

Module selection and sequencing must consider the module parameters, which define:

- prerequisite and corequisites (entry-level competencies)
- instructional qualifications, if specialized
- equipment and facility requirements, if specialized.

The module parameters are defined for each module in Sections D, E and F of this Guide.

Degree of Flexibility

The CTS program, while designed using the modular structure to facilitate flexible time-tabling and instructional delivery, does not mandate the degree of flexibility a school or teacher will offer. The teacher and school will determine the degree of flexibility available to the student. Within the instructional plan established by the school, the student may:

- be given the opportunity to progress at a rate that is personally challenging
- have increased opportunity to select modules that develop competencies he or she finds most relevant.

Integrating Basic Competencies

Basic competencies are integrated throughout the CTS program and within each module. Selected basic competencies will be emphasized within a module, depending on the nature of the career-specific competencies defined for the module.

Section G (Assessment Tools) of this Guide provides a description of student behaviours expected at each of the three developmental levels defined for the basic competencies.

Assessment of basic competencies could include input and reflection from the student, teacher, peers and workplace supervisors. Description of the observed behaviour could be provided through a competency profile for the module. Positive, ongoing interaction between the student and teacher will support motivation for student growth and improvement.

The basic competencies related to teamwork, leadership and service should be emphasized in Management and Marketing modules at the advanced level where group activities and projects would be appropriate.

Although no mark would be assigned to the student's performance in the designated basic competencies, a description of the level of performance should be included within the assessment of each module.

Assessing Student Achievement

Assessing the student's competency is a process of gathering information by way of observations of process, product and student interaction.

Where appropriate, assessment tools have been defined to assist the teacher and student in the assessment. Section G (Assessment Tools) of this Guide to Standards and Implementation will provide copies of the various tools (worksheets, checklists, sample questions, etc.).

The relative weighting, or emphasis, for each assessment standard has also been established. The weighting is a guideline to help teachers determine a percentage grade for students.

Recognizing Student Achievement

At the high school level, successful demonstration of the exit-level competencies in a module qualifies the student for one credit. Refer to Section A of this Guide for more detailed information about how curriculum and assessment standards are defined in CTS. Refer to the *CTS Manual for Administrators, Counsellors and Teachers* for more information on how student achievement can be recognized and reported at the school and provincial levels.

Resources

A comprehensive resource base, including print, software and audio-visual, has been identified to support the Management and Marketing strand. It is intended that these resources will form the basis of a resource centre, encouraging teachers and students to access a wide selection of resources and other information sources throughout the learning process. Unless otherwise noted, these resources are considered to be suitable for both junior and senior high school students.

Authorized resources may be obtained from the Learning Resources Distributing Centre or directly from the publisher or distributor. Refer to Section I (Learning Resource Guide) of this Guide for the complete resource list including curriculum correlations and resource annotations. Additional sources refer to non-commercial or government agencies that offer resources that may be of assistance in this strand.

In addition to the resources, sample Student Learning Guides will be available. These samples, designed for individual student or small group use, provide an instructional plan for selected modules and include the following components:

- Why take this module?
- What are the entry-level competencies?
- What are the exit-level competencies?
- What resources may be accessed?
- What assignments/activities must be completed?
- What are the time lines?
- How will the final mark be calculated?

Sample Student Learning Guides for Management and Marketing will be validated and expanded over the 1995–96 school year.

Copies of these sample learning guides will be available, by request, from the CTS Unit in print and/or disk format (Microsoft Word).

PLANNING FOR MANAGEMENT AND MARKETING

The following suggestions are provided to assist teachers and school and school system administrators as they plan to deliver modules from the Management and Marketing strand.

Selecting Modules

The scope and sequence chart on page B.5 provides an overview of the Management and Marketing modules, indicating prerequisites and

theme areas. Brief descriptions of the modules are on pages B.6 to B.7.

Management and Marketing for Junior High School Students

Four introductory level modules may be offered at junior high: Management and Marketing Basics, Quality Customer Service and Communication Strategies I, and Information Highway I. The number of modules in CTS will vary according to the time available; e.g.:

Time Available	Modules
25 hours	Management and Marketing Basics
50 hours	Management and Marketing Basics Quality Customer Service *or* Communication Strategies I
75–100 hours	add Information Highway I or modules from other CTS strands (e.g., Enterprise and Innovation, Communication Technology, Information Processing, Legal Studies, Financial Management)

Where appropriate, junior high school students may also take intermediate level modules. Modules may be combined into courses and offered within a school year or over a span of a few years.

Management and Marketing for Senior High School Students

Following are a few examples of module groupings into sample courses:

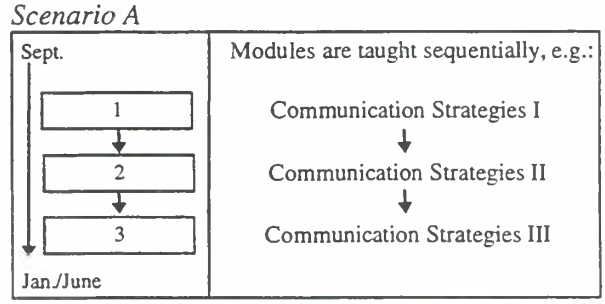
5–6 credits (no previous experience) (Business Management emphasis)	Management and Marketing Basics Information Highway I Managing for Quality The Business Organization Business in the Canadian Economy Business in the Global Marketplace
5–6 credits (no previous experience) (Information Management Systems and Strategies)	Communication Strategies I Office Management I Records Management I Communication Strategies II Office Management II Records Management II
5–6 credits (no previous experience) Marketing/Retailing emphasis)	Management and Marketing Basics Quality Customer Service Retail Operations Promotion: Advertising Promotion: Visual Merchandising Promotion: Sales Techniques
5–15 credits (foundation for entry into workplace in customer service)	Quality Customer Service Retail Operations Promotion: Visual Merchandising and modules selected from other CTS strands (e.g., Foods, Tourism Studies)
5–15 credits (foundation for entry into workplace into administrative positions)	Managing for Quality Communication Strategies I Office Management I Records Management I Office II and modules selected from other CTS strands (e.g., Information Processing, Financial Management)

Modules could also be grouped into comprehensive courses that emphasize a particular theme.

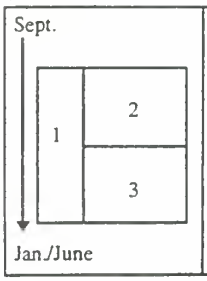
Organizing for Learning

Prior to selecting modules, teachers should check the module parameters outlined in each module (see Sections D, E and F of this Guide). Modules can be delivered sequentially, concurrently or combined; e.g.:

Scenario A

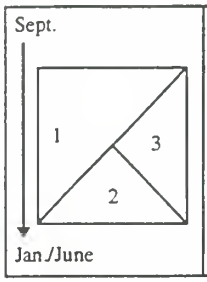


Scenario B



One module, such as Management and Marketing Basics, is taught throughout the course (e.g., 20 minutes per class), in conjunction with two other modules.

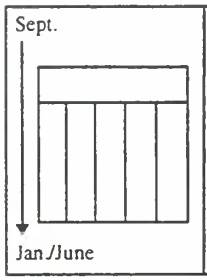
Scenario C



Time allocated to a prerequisite/ corequisite module, such as Information Highway I, Information Highway II and Business in the Global Marketplace, decreases as students develop competencies in Communications Strategies II and III.

Teachers can also allow students to progress at a rate that is personally challenging; e.g.:

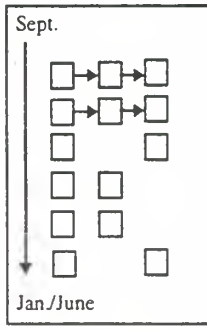
Scenario D



All students take one or two modules together, then are able to select modules from a list of modules.

Management and Marketing Basic or Managing for Quality plus 3-4 other modules from a menu of modules.

Scenario E



From a list of modules selected by the teacher, the students select which ones they will work on and, in consultation with the teacher, establish time lines for completion and submission of assignments, etc.

Identifying Linkages

Section H of this Guide describes some linkages that are possible within the Management and Marketing strand and:

- other CTS strands
- junior and senior high school Math and Science programs. Additional linkages with language arts and social studies and complementary programs will be defined.

Special Relationship to Enterprise and Innovation

The Management and Marketing strand expands and enhances competencies developed within the Enterprise and Innovation strand. For many students, courses will include modules from both Enterprise and Innovation and Management and Marketing. The Extended Scope and Sequence in Section H shows how the two strands can be integrated. Modules can be organized in an integrated course or presented separately.

Enterprise and Innovation modules focus on encouraging individuals to establish ventures (both profit and non-profit), providing students with a comprehensive understanding of how to start and manage a business and market a product of service. Management and Marketing provides more depth and specialization, emphasizing profit and competition within the Canadian and global economies. While Enterprise and Innovation emphasizes small business organizations, Management and Marketing also includes large organizations, both private and public.

Other Linkages within CTS

Students will also find that selected modules from Management and Marketing complement their learnings from other CTS strands. For example, a student focusing on Mechanics who plans to own a garage would benefit from learning effective and efficient strategies to manage the shop and market the repair services. Students targeting any one of the Management and Marketing themes will benefit from modules from other CTS strands:

A sample of these combinations are provided in the table below.

Management and Marketing Themes	Complementary Strand
Business Management Systems and Strategies	Enterprise and Innovation Legal Studies Financial Management Information Processing
Marketing Systems and Strategies	Enterprise and Innovation Communication Technology Fashion Studies Design Studies Information Processing Tourism Studies
Information Management Systems and Strategies	Information Processing Communication Technology

Note that project modules from the Career Transitions strand may be combined with modules from other strands to provide increased opportunity for students to develop expertise and refine their competencies. Project modules are **not** designed to be offered as distinct courses and should **not** be used to extend Work Experience 15, 25 and 35 courses.

Improving Smooth Transition to the Workplace and/or Related Post-secondary Programs

Section H of this Guide also provides potential transitions students may make:

- into the workplace
- into related post-secondary programs or other avenues for further learning.

MODULE CURRICULUM AND ASSESSMENT STANDARDS: INTRODUCTORY LEVEL

The following pages define the curriculum and assessment standards for the introductory level of Management and Marketing.

Introductory level modules help students build daily living skills and form the basis for further learning. Introductory modules are developed for students who have no previous experience in the strand.

Module learner expectations define the competencies a student must demonstrate to achieve success in a module. Assessment standards define the conditions and criteria to be used for assessing the competencies defined in the module learner expectations. These assessment standards and the accompanying assessment tools are in draft form and will be validated from 1994 to 1996.

Specific learner expectations provide a detailed framework for instruction and help students build the competencies defined in the module learner expectations. Additional information and suggestions for instruction are provided in the Notes column; teachers may wish to use this space to record their ideas for instruction or student projects.

Module M&M101: Management and Marketing Basics D.3
Module M&M102: Quality Customer Service.....D.9
Module M&M103: Communications Strategies I.....D.15
Module M&M104 Information Highway I D.19

MODULE M&M101: MANAGEMENT AND MARKETING BASICS

Level: **Introductory**

Theme: **Marketing Systems and Strategies**

Prerequisite: **None**

Module Parameters: **None**

All students have had personal experiences with management and marketing in their everyday lives. The purpose of this module is to introduce students to basic management and marketing concepts. An introduction to retailing and retail merchandising offers students an opportunity to change from being the customer to being the retail employee, manager or owner.

Curriculum and Assessment Standards

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
The student will:	*Assessment of student achievement will be based on:*	
• identify key business systems and strategies used in the marketplace	• **Concept Test** consisting of questions related to business basics: – terminology – economic systems and principles. *Assessment Tool* *(to be developed)*	10
• relate management concepts to: – his or her personal life – organizations he or she is involved in – different types of businesses (large and small)	• **Personal Management Project** consisting of how people use planning, organizing, leading and monitoring skills everyday when striving to achieve success in: – personal and family lives – local organizations including schools – local businesses. *Assessment Tool* *(to be developed)*	20

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
The student will:	*Assessment of student achievement will be based on:*	
• describe the characteristics of marketing and decisions made within the marketing mix	• **Marketing Project** consisting of selecting and/or making a product and a service and listing decisions that a manufacturer, wholesaler and/or retailer would make regarding product/service, price, promotion, place, consumer and competition. *Assessment Tool* *(to be developed)*	20
• describe the role of retailing: – in Canadian history – in Canada today – in Canada in the future	• **Presentation** consisting of the: – role of retailing in the marketplace – evolution of retailing – role of technology in retailing – functions of retailing (buying, selling and merchandising). *Assessment Tool* *(to be developed)*	20
• identify and analyze retail merchandising strategies used in the marketplace	• **Report** on observations made of merchandising strategies consisting of product, price, service, place and promotion. *Assessment Tool* *(to be developed)*	20
• identify management and marketing careers of personal interest	• **Personal Inventory** of self to include: – assessment of talents and interests – exploration of management and marketing careers related to talents and interests – identification of career interests. *Assessment Tool* *(to be developed)*	10
• demonstrate effort to develop basic competencies.	• **Observation** of individual effort and interpersonal interaction during the instructional period, emphasizing: – managing learning – managing resources – acting ethically – communication – demonstrating responsibility. *Assessment Tool* *Basic Competencies Reference Guide and any assessment tools noted above*	Integrated throughout

Concept	Specific Learner Expectations	Notes
Business Systems and Strategies	*The student should:* • define basic terminology used in the marketplace including producer, consumer, consumption, distribution, factors of production (land, labour, capital) • describe the types of economic systems (market, command, mixed) • identify the economic system used in Canada • explore the relationship between production, distribution and consumption (P-D-C Cycle) • identify the relationship between supply and demand.	
Management Systems and Strategies	• define and discuss past and present experiences of management: – personal management – management at home – management of the school – management of organizations to which he or she belongs • identify and discuss the role of management in an organization: planning, organizing, acting, leading, monitoring, communicating • identify features of different types forms of business ownership: sole proprietor, partnership, corporation, franchise, cooperative, conglomerate, multinational, crown corporation.	

Concept	Specific Learner Expectations	Notes
Marketing Systems and Strategies	*The student should:* • define his or her past or present marketing experiences	
	• identify the importance of marketing to a market economy	To production? to consumption?
	• analyze the relationship between satisfying consumers and making a profit	Can you have one without the other?
	• identify the components of the "marketing mix" (four Ps and two Cs)	Product, price, promotion, place, consumers, competition.
	• investigate decisions made in each component of the marketing mix	Compare these decisions to making a cake; e.g., what happens when one of the ingredients is missing? What happens when you change the ingredients such as vanilla to chocolate?
	• describe the focus marketing takes for different types of businesses: – *manufacturers* - product and service development – *wholesalers* - marketing products and services to retailers and other businesses – *retailers* - marketing to end user (the ultimate consumer)	
	• consider the effect marketing decisions have on society (environmental concerns, cultural issues)	For example, reduce, reuse, recycling.
	• differentiate between marketing and retail merchandising.	

Concept	Specific Learner Expectations	Notes
The Role of Retailing in Marketing	*The student should:* • discuss the important role of retailing in Canada	Closest link is to the consumer.
	• describe the evolution of retailing in Canada	Historical perspective (e.g., bartering and the marketplace, impact of World War I, railway and automobiles, introduction of the supermarket).
	• explore the role of technology in the evolution of retailing including: – electronic banking (debit and credit cards) – home shopping – Scanners/UPC (Universal Product Codes) – improved product quality – just-in-time delivery	
	• identify and explain the three major functions of retailers: – buying – selling – merchandising.	Merchandising is having the right goods, in the right quantity, at the right price, at the right time, in the right place and ensuring consumers know about it.
Retail Merchandising Strategies	• explore and show examples of *product merchandising strategies* used to increase sales including: – scrambled merchandising – narrowing the product line – sampling and product demonstrations – shelf positioning (eye-level) – packaging (name, colour, size, pictures) – brand selection and identification	Scavenger hunt in a variety of retail stores could be used when exploring merchandising strategies.
	• explore and show examples of *pricing merchandising strategies* used to increase sales including: – multiple pricing – unit pricing on shelves – warehouse pricing – loss leaders	National brands, house brands, no name. Three for $1.00.
	• explore and show examples of *service merchandising strategies* used to increase sales including: – hours of operation – franchising—dependable, consistent – loyalty programs; e.g., points, Air Miles – delivery, gift wrapping, installation or repair – satisfaction guaranteed	

Concept	Specific Learner Expectations	Notes
	The student should: • explore and show examples of *place merchandising strategies* used to increase sales including: – size of store – layout of store—commonly purchased items placed around the perimeter of the store – use of direct lighting to enhance products • explore and show examples of *promotional merchandising strategies* used to increase sales including: – visual merchandising—window displays, point of purchase displays (POP) – posters and advertisements around the store that coordinate with promotional campaigns in the media – shelf cards indicating specials – packaging and labeling.	Big has lots to offer, small is specialized and knowledgeable. For example, produce in a supermarket. POP displays include end of counter, tumble (bins), multiple pricing, tie-in displays (related items). Pictures and graphics on packaging, brand names such as Healthy Choice.
Careers and Opportunities	• investigate a variety of careers available within the field of management and marketing • identify careers of interest within the field of management and marketing.	Retailing, wholesaling , manufacturing, advertising, etc.

MODULE M&M102: QUALITY CUSTOMER SERVICE

Level: **Introductory**

Theme: **Marketing Systems and Strategies**

Prerequisite: **Management and Marketing Basics (M&M101)**

Module Parameters: **School store lab recommended, but not required**

Serving the customer is an important function of marketing and affects the success of any retail organization. This module introduces students to the customer and the selling floor including sales and non-sales activities.

Curriculum and Assessment Standards

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
The student will:	*Assessment of student achievement will be based on:*	
• identify and describe: – how retailers target their markets – a variety of consumer behaviours	• **Production of a Customer Portfolio** consisting of: – description of the target market including participants and psychographics of participants for a: • product • retailer • service – presentation of a minimum of six different consumer behaviours including buying motive and influences on purchases – description of the AIDA concept and how it is used to stimulate purchasing. *Assessment Tool* *(to be developed)*	30
• demonstrates effective retail sales/service techniques as: – a retail sales clerk and/or service provider – cashier	• **Effective Performance in a Retail Simulation or Work Situation** consisting of both selling and non-selling activities. *Assessment Tool* *Retail Sales Clerk Assessment (M&M102-1)* *Cashier Station Assessment (M&M102-2)* *Standard* *Level 3 competencies in last quarter of learning period*	60

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
The student will: • identify personal interests and opportunities as they relate to careers in retailing • demonstrate effort to develop basic competencies.	*Assessment of student achievement will be based on:* • **Career Profile** that includes job descriptions, education/qualification requirements, employment opportunities, advancement potential and salary range. *Assessment Tool* *(to be developed)* • **Observation** of individual effort and interpersonal interaction during the instructional period, emphasizing: – managing learning – managing resources – acting ethically – teamwork and leadership – demonstrating responsibility. *Assessment Tool* *Basic Competencies Reference Guide and any assessment tools noted above*	10 Integrated throughout

Concept	Specific Learner Expectations	Notes
Knowing the Customer	*The student should:* • define target market • identify and describe the components of a target market: – participants—buyers, users, influencers – demographics—age, sex, income, geographical location, education, ethnic origin, economic background – psycographics—lifestyles including attitude, interests and habits • identify target markets for a variety of products and/or services.	

Concept	Specific Learner Expectations	Notes
	The student should:	
Consumer Behaviours	• describe basic needs and identify several examples	
	• describe secondary "wants" and identify several examples	
	• compare recent purchases and indicate if they were needs or wants	
• Buying Motives	• describe Maslow's hierarchy of needs and identify purchases made at each level	Self-fulfillment, esteem, belonging, safety, physical.
	• identify and give examples of: – rational buying motives – emotional buying motives	Quality, price, convenience. Love, pride, fear.
	• identify your buying motives on recent purchases	
• Influences	• explain the influences of income on purchases	Disposable income, discretionary income.
	• discuss how advertising influences consumer purchases	Persuasion, information.
	• describe the AIDA concept (**A**ttention, **I**nterest, **D**esire, **A**ction) and indicate its relationship to consumer behavior	
	• identify influences on recent purchases.	
Quality Service • Personal Characteristics	• demonstrate high standards of personal health, grooming and cleanliness	
	• demonstrate proper interaction and relationships with: – customers – co-workers – supervisors – suppliers	Dependability, loyalty, collaborative, reliable.

Concept	Specific Learner Expectations	Notes
	The student should:	
• Role of Sales Clerk	• differentiate between the role of a sales clerk/service provider and a salesperson	Waiting on customers versus presenting to them
	• describe or demonstrate how sales clerks obtain product knowledge	On-the-job training, other employees, manuals, sale reps., labels and packaging.
	• demonstrate quality customer service when: – preparing sales receipts/bills – dealing with various customer types – handling customer complaints and returns	Committed, knowledgeable, just-looking, undecided, rushed, disagreeable, know-it-all.
	• demonstrate use of proper approach (greeting, service, merchandise)	
• Role of a Cashier	• demonstrate quality customer service skills as a cashier: – identify and label various cash register parts and functions – use of float and cash draw organization – operate cash register/cash box – accept cheques and/or credit cards – make change and count change back to customer – wrap/bag merchandise – take leave of customer – close and cash out a cash register – accurately complete cash reconciliation – prepare a store deposit.	Use cash register manuals. Use least amount of coins and bills possible.
Completing Non-selling Activities	• demonstrate the ability to follow store policies and procedures	For example, security, employee conduct.
	• demonstrate upkeep and maintenance of a store	Interior and exterior displays, floors, counters and shelves.
	• maintain well-stocked shelves	Rotation of stock.
	• assist in preparing promotional campaigns including visual merchandising.	Students help construct and maintain preplanned displays or help prepare promotional campaigns as a class project.

Concept	Specific Learner Expectations	Notes
Career Exploration	*The student should:* • investigate a variety of career opportunities in retailing • identify personal interests, talents and experiences as they relate to careers in retailing.	Define key terms related to career path/ladders, entry-level positions, mid-management, management positions.

MODULE M&M103: COMMUNICATION STRATEGIES I

Level: **Introductory**

Theme: **Information Management Systems and Strategies**

Prerequisites: **Workstation Operations (INF101; recommended)**
Keyboarding I (INF102; recommended)

Module Parameters: **Access to computer work station**

This module improves students' oral and written business communications skills necessary for efficient and effective management of information. The focus is on business writing strategies and composing at the computer when preparing memoranda, e-mail messages and business letters.

Curriculum and Assessment Standards

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
The student will:	*Assessment of student achievement will be based on:*	
• demonstrate use of the writing process when composing correspondence including: – prewriting – writing – revising – proofreading	• **Correspondence Writing Project** consisting of planning, composing, revising and proofreading a minimum of: – two memoranda – two e-mail messages (send and reply) – one personal business letters regarding a business matter (e.g., letter of complaint from a customer) – two business letters, each regarding a different business matter. *Assessment Tool* *(to be developed)*	70
• demonstrate appropriate ways to deal with callers: – face to face – on the telephone	• **Role-playing Situation** consisting of a minimum of two 2-way business communication scenarios for both a face-to-face and telephone situation. Show evidence of proper telephone etiquette when making/answering calls, during the call and following the call. *Assessment Tool* *(to be developed)*	20
• identify personal interests and opportunities as they relate to applying effective communication strategies in career areas	• **Career Profile** that includes job descriptions, education/qualification requirements, employment opportunities, advancement potential and salary range. *Assessment Tool* *(to be developed)*	10

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
The student will: • demonstrate effort to develop basic competencies.	*Assessment of student assessment will be based on:* • observations of individual effort and interpersonal interaction during the instructional period, emphasizing: – managing learning – managing resources – teamwork and leadership – being innovative – demonstrating responsibility *Assessment Tool* *Basic Competencies Reference Guide and any assessment tools noted above*	Integrated throughout

Concept	Specific Learner Expectations	Notes
Planning to Write Business Documents	*The student should:* • identify and describe the different types of business documents – memoranda (memos) – electronic messages (e-mails) – personal business letters – business letters – informal business reports – form business reports – proposals and press releases • outline and examine the steps in the writing process: prewriting, composing, revising, proofreading • describe strategies to use when planning to write business documents – identify the main point – identify the audience – determine the type of document (letter, memo) – plan the message by listing points – arrange points in logical order • review basic sentence structure, grammar, spelling and punctuation rules.	

Concept	Specific Learner Expectations	Notes
Writing Effective Memos	*The student should:* • identify and use *prewriting* strategies when preparing e-mail messages and memos: – good organization – get to the point quickly – supply accurate information – indicate specific actions • select a format to use before writing a memo or e-mail message • *compose* the first draft of the memo using a word-processing programs/templates • identify and use *revising* strategies (e.g., check for brevity, active language and clarity) • identify and use *proofreading* strategies: – proofread for facts, dates, names, figures and other statistical information – proofread for sentence structure, grammar, spelling, punctuation and format.	
Writing Effective Business Letters	• differentiate between a personal business letter and a business letter • describe the functions of a business letter: – sell products or services – request material or information – answer customer inquiries or complaints – increase goodwill – act as a permanent record – written contract • identify and use *prewriting* strategies when preparing personal business and business letters: – identify the purpose and audience – identify what details need to be included – complete any necessary research – organize the letter using letter formulas – outline the details of the letter in order they should appear • select a letter format to use before writing	For example, AIDA formula: attention interest, desire, action.

Concept	Specific Learner Expectations	Notes
	The student should: • *compose* the first draft of the letter using a word-processing program. Include an opening, body and • identify and use *revising* strategies for a business letter closing • identify and use *proofreading* strategies: – proofread for facts, dates, names, figures and other statistical information – proofread for sentence structure, grammar, spelling, punctuation and format.	
Effective Oral Communications in Business	• describe effective oral communication strategies used in business • discuss the significance of non-verbal language • practise using proper telephone etiquette when making/answering calls, during the call and following the call • practise making proper business introductions.	Opening, listening, responding. Body language.
Career Exploration	• investigate a variety of career opportunities related to business communications • identify personal interests, talents and experiences as they relate to careers in business communications.	Define key terms related to career path/ladders, entry-level positions, mid-management, management positions.

MODULE M&M104: INFORMATION HIGHWAY I

Level: **Introductory**

Theme: **Information Management Systems and Strategies**

Prerequisite: **Workstation Operations (INF101; recommended)**

Module Parameters: **Access to computer work station**

This module offers students an opportunity to develop personal-use skills in using bulletin board systems or the Internet for accessing and communicating data and information.

Curriculum and Assessment Standards

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
The student will:	*Assessment of student achievement will be based on:*	
• demonstrate basic use of bulletin board systems and/or the Internet to locate and screen information	• **Project** related to: – logging on – using network protocols – using basic terminology and commands: – exploring bulletin boards and/or the Internet to discover its potential – finding information regarding proper "netiquette" (Internet etiquette).	20
• demonstrate ability to communicate with others through bulletin boards and/or the Internet	• **Communication** through bulletin boards and/or the Internet including: – sending mail – reading mail – replying to mail – managing a mailbox.	30
• demonstrate ability to access specific information from bulletin board systems, newsgroups or mailing lists	• **Access to Specific Information** using a minimum of three bulletin boards, newsgroups or mailing lists: – find information – download – print – cut/paste/edit and format collected data. *Assessment Tool* *(to be developed)*	40
• consistently apply appropriate workstation routines	• **Meeting** or exceeding "acceptable" standards in appropriate workstation routines. *Assessment Tool* *(to be developed)*	10

MODULE M&M104: INFORMATION HIGHWAY I (continued)

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
The student will: • demonstrate effort to develop basic competencies.	*Assessment of student assessment will be based on:* • **Observation** of individual effort and interpersonal interaction during the instructional period, emphasizing: – managing learning – managing resources – acting ethically – communication – demonstrating responsibility. *Assessment Tool* *Basic Competencies Reference Guide and any assessment tools noted above*	Integrated throughout

Concept	Specific Learner Expectations	Notes
Getting Started	*The student should:* • define and describe the purpose of bulletin boards and the Internet • compare functions and terminology between e-mail, bulletin board systems, the Internet and commercial on-line data bases • identify and evaluate service providers • decipher bulletin board/Internet addresses • obtain a bulletin board or Internet address • list uses for bulletin boards and the Internet • identify various bulletin board systems/mailing lists/on-line data bases and their purposes • use modem/telephone/computer to log-on • connect to network protocols • use appropriate commands for computer platform to access bulletin boards and/or the Internet	Userid, domain, subdomains. Exchange ideas, retrieve information for research and personal use, try software, move information to others, requirement for future employment.

Concept	Specific Learner Expectations	Notes
	The student should: • explore various bulletin boards and the Internet: – identify potential data sources – access server/files – use menu alternatives • locate and discuss information related to netiquette (network etiquette) • examine issues and strategies related to maintaining security.	For example, Usenet Manners: Emily Postnews Answers Your Questions on Netiquette.
Communicating	• gain access to mail • practise sending mail to self, then to others • access mailbox and read mail • reply to an e-mail message sent to him or her • organize the mailbox: – delete messages not needed – save messages in student's own account.	
Finding and Collecting Data	• search bulletin board systems to locate specific information • define the different types of newsgroup users: – wizards (help newcomers) – saints (deep knowledge and understanding) – flamers (respond to messages negatively) – lurkers (read, but not submit anything) • differentiate between mailing lists and list serves • subscribe/desubscribe to a mailing list • locate useful data/information using newsgroups, mailing lists and/or on-line commercial data bases • read/summarize from screen • print screen/file(s) • download file • cut/paste/edit and format collected data(s).	Usenet offers over 4,000 topics

Concept	Specific Learner Expectations	Notes
Workstation Management	*The student should:* • apply efficient workstation position and routines that encourage: – good health and safety (posture, positioning of hardware and furniture) – security for hardware, software, supplies and personal work • demonstrate efficient and appropriate use of time and resources in terms of: – start-up procedures – organization of work area – closing procedures • apply effective decision-making strategies when using bulletin boards, the Internet and on-line commercial databases • use related terminology to describe basic protocols, processes and tools.	

MODULE CURRICULUM AND ASSESSMENT STANDARDS:

INTERMEDIATE LEVEL

The following pages define the curriculum and assessment standards for the intermediate level of Management and Marketing.

> Intermediate level modules help students build on the competencies developed at the introductory level and focus on developing more complex competencies. They provide a broader perspective, helping students recognize the wide range of related career opportunities available within the strand.

Module M&M201: Managing for Quality E.3
Module M&M202: Promotion: Advertising E.9
Module M&M203: Promotion: Visual Merchandising E.15
Module M&M204: Retail Operations E.21
Module M&M205: Office Systems I E.27
Module M&M206: Communication Strategies II E.31
Module M&M207: Information Highway II E.35
Module M&M208: Records Management I E.39

MODULE M&M201: MANAGING FOR QUALITY

Level: **Intermediate**

Theme: **Business Management Systems and Strategies**

Prerequisite: **Management and Marketing Basics (M&M101)**

Module Parameters: **None**

The role and responsibilities of management are to coordinate all available resources to achieve quality results. This module provides an opportunity for students to develop basic managerial skills.

Curriculum and Assessment Standards

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
The student will:	*Assessment of student achievement will be based on:*	
• outline quality management systems and strategies and how quality is improved in organizations including:	• **Presentation** consisting of: – the role of customers, employees, and managers in managing for quality – teams and decision making in managing for quality – how quality is measured. *Assessment Tool* *(to be developed)*	10
• analyze the roles of managers and strategies used to improve quality	• **Analyses** of four case studies using videos, magazine articles, books, and/or newspaper clippings. Discuss strategies used by managers to plan, organize, lead, monitor and communicate to improve quality. *Assessment Tool* *(to be developed)*	30
• apply management systems and strategies	• **Management Analysis Report** that identifies an area that needs improvement, defines the problem, clarifies goals/rationale for changing the system, develops strategies for change, and plans, implements and monitors the change. *Assessment Tool* *(to be developed)*	30

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
The student will:	*Assessment of student achievement will be based on:*	
• research a current management system and its effect on the organization	• **Critical Review** of a current management system consisting of a summary of the practice (including strategies), pros and cons, and personal views regarding the system. *Assessment Tool* *(to be developed)*	20
• identify personal interests and opportunities as they relate to careers in management	• Career Profile that includes job descriptions, education/qualification requirements, employment opportunities, advancement potential and salary range. *Assessment Tool* *(to be developed)*	10
• demonstrate effort to develop basic competencies.	• observations of individual effort and interpersonal interaction during the instructional period, emphasizing: – managing learning – managing resources – acting ethically – being innovative – communication – teamwork and leadership. *Assessment Tool* *Basic Competencies Reference Guide and any assessment tools noted above*	Integrated throughout

Concept	Specific Learner Expectations	Notes
Quality Systems and Strategies	*The student should:* • examine the role of the customer in managing for quality • examine the role of front-line employees in managing for quality • examine the role of managers in managing for quality • describe how groups/teams can be used effectively	Planning, organizing, leading, monitoring, communicating. Team size/type, team leader role, team decision.

Concept	Specific Learner Expectations	Notes
	The student should:	
	• describe decision-making processes when working in teams	
	• investigate how quality is measured.	End of line versus during production.
• Strategies for Planning	• research *planning* as one of the basic management roles and elaborate on the importance of planning for quality: – establishing objectives – developing a mission statement and setting goals – determining how objectives will be met	Increased market share, profit, social responsibility. Creating a vision. Coordinating the organization's resources, personnel, finances, information, materials, facilities and what activities are required.
	• compare management planning with team planning	
	• discuss similarities and differences in forecasting/planning at the three management levels (strategic, tactical, operational)	
	• explain why contingency planning is vital	
• Strategies for Organizing	• research *organizing* as one of the basic management roles and elaborate on the importance of organizing for quality	Identify who is involved, who is in charge, what resources are required, and how communication will flow.
	• contrast directing with facilitating	
	• discuss how people working for a common objective can be organized for efficiency	Synergism.
	• describe and provide examples of: – organizational charts – centralized versus decentralized control	
	• power, authority, responsibility, accountability, delegation.	
• Strategies for Leading	• research *leadership* as a basic management role and elaborate on the importance of leading for quality	How does a leader differ from a manager?
	• describe the different styles of leadership	Authoritarian, democratic.

Concept	Specific Learner Expectations	Notes
	The student should: • compare controlling with empowering • explain how "power" is obtained and used and the relationship of "power" and "authority" • discuss motivations and factors that affect individual motivational levels: – individual differences (attitudes, needs) – job characteristics (task and its significance, skill levels, autonomy, feedback, communication) – organizational policies and practices (rules, intrinsic/extrinsic rewards) • describe how effective leaders influence others to act: – share influences and motivate individuals – match individual aspirations with organization goals – apply intuition, anticipate change, assess, respond – vision—identify different/better ways of proceeding – self-understanding—recognizing one's own strengths and weaknesses	
	• compare the types of groups that exist in an organization and explain how group development/processes can be encouraged.	For example, team planning, collaboration, shared decision-making.
• Strategies for Monitoring	• research *monitoring* as a basic management role and elaborate on the importance of monitoring for quality • explain how technology can be used to help monitor data, information, organizational activities • elaborate on ethical issues of monitoring and control of employees.	
• Strategies for Communicating	• research *communicating* as a basic management role and elaborate on the importance of communicating for quality: – relationship between communication, action and quality results	Coordinate action between managers and workers.

MODULE M&M201: MANAGING FOR QUALITY (continued)

Concept	Specific Learner Expectations	Notes
	The student should: • identify reasons for conflict and stress • describe how a managers can deal effectively with conflict resolution.	
Applying Quality Management Systems and Strategies	• use quality management systems and strategies in a group environment • evaluate current management systems and strategies used by managers to increase quality.	For example, managing change, learning organizations, restructuring, downsizing, re-engineering, bionomics.
Career Exploration	• investigate a variety of career opportunities related to management • identify personal interests and experiences as they relate to careers in management.	Define key terms to career path/ladders, entry-level positions, mid-management, upper management.

MODULE M&M202: PROMOTION: ADVERTISING

Level: **Intermediate**

Theme: **Marketing Systems and Strategies**

Prerequisite: **None**

Module Parameters: **Access to cassette player with microphone, Camcorder for broadcast, computer workstation with graphics software recommended for print advertising**

The advertising process involves mass media communicating with a mass audience in order to establish a continuous recognition of a sponsor or product. This module is an introduction to communication channels, delivery strategies and advertising media that can be used to inform potential customers about products and services available in the marketplace.

Curriculum and Assessment Standards

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
The student will:	*Assessment of student achievement will be based on:*	
• describe principles involved in the advertising process and apply these principles to print and broadcast media	• **Concept Test** consisting of questions on principles and terms in the advertising process including: – definition of advertising and publicity – controversial issues, laws, regulations and ethics in advertising – identification and selection of target markets – objectives of advertising – examples of geographical advertising – media: advantages and disadvantages of each medium and cost considerations *Assessment Tool* *(to be developed)*	10
• investigate and report on basic broadcast media concepts	• **Report** consisting of: – types of broadcast media – role of Canadian Radio–television and Telecommunications Commission (CRTC) – brief history of both radio and television – types of ownership of both radio and television – local examples of radio stations and television networks and the types of audiences they attract. *Assessment Tool* *(to be developed)*	10

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
The student will:	*Assessment of student achievement will be based on:*	
• evaluate advertisements for each medium (print, radio and television)	• **Advertising Portfolio** consisting of a collection of three advertisements for each medium (print, radio and television) which includes: – type of media – target market – objective – effective use of each component or production techniques – how the AIDA concept was used (**A**ttention, **I**nterest, **D**esire, **A**ction). *Assessment Tool* *(to be developed)*	20
• design and create an effective promotional advertisement for two of the following media: – print – television – radio	• **Project** consisting of: – preplanning of advertisement through use of rough draft, radio script or storyboard – final draft – presentation of the advertisements – self-assessment of created advertisement. *Assessment Tool* *(to be developed)*	50
• identify personal interests and opportunities as they relate to careers in advertising	• **Career Profile** that includes job description, education/qualification requirements, employment opportunities, advancement potential and salary range. *Assessment Tool* *Print Advertisement Assessment (M&M202-1)* *Radio Commercial Assessment (M&M202-2)* *Television Commercial Assessment (M&M202-3)* *Standard* *Level 2 competencies in each section*	10
• demonstrate effort to develop basic competencies.	• observations of individual effort and interpersonal interaction during the instructional period, emphasizing: – managing learning – managing resources – teamwork and leadership – being innovative – demonstrating responsibility. *Assessment Tool* *Basic Competencies Reference Guide and any assessment tools noted above*	Integrated throughout

Concept	Specific Learner Expectations	Notes
	The student should:	
The Advertising Process	• explain what advertising is and what purpose it serves • differentiate between publicity and advertising • debate the various criticisms, controversies, laws and ethics regarding advertising	Collect a range of advertisements and publicity notices and establish a portfolio/ scrapbook. Gender stereotyping, misleading advertising, and regulations.
• Target Market	• provide examples that illustrate a variety of target markets for the following types of advertisements: – consumer products – consumer services – business product – business service – advocacy (institutional) advertising	Who will buy it, when, where? Are features of product or service transformed into customer benefits?
• Objectives	• discuss a variety of objectives marketers use when developing advertising campaigns	For example, attract new customers, inform customers of a new product.
• Geographic Market	• obtain specific examples of geographical promotional strategies: – local – regional – national – international	For example, small local businesses advertising locally versus large corporations advertising nationally.
• Media	• identify and provide examples of various print and broadcast media • discuss the advantages and disadvantages of each medium • compare costs in relationship to return on investment (audience versus cost of creating/producing and placing advertisement).	
Creating a Print Advertisement	• discuss the steps in planning a print advertisement: – type of print media – state the objective – define the target audience – select the buying motive (use of USP)	

Concept	Specific Learner Expectations	Notes
	The student should: • identify and analyze each component of a print advertisement: – borders – headline(s) – illustration or graphic – copy – logo (signature) • demonstrate the use of effective layout arrangements: – use of white space – use of different fonts – placement of the various components • present and evaluate own print advertisement.	Use of AIDA concept: attract attention, create interest, stimulate desire, induce action.
Overview of Broadcast Media	• discuss the types of broadcast advertising • describe the role of the CRTC • explore the history of both radio and television • explain the types of ownership and programming found in radio and television • identify a variety of radio stations available to the various listeners in the immediate area • describe the types of television stations: – network-affiliated – network-owned – independent • investigate other means of television advertising such as cablevision, pay TV, videocassette recordings, satellite, infomercials.	Radio, television.

MODULE M&M202: PROMOTION: ADVERTISING (continued)

Concept	Specific Learner Expectations	Notes
Advertising on Radio	*The student should:* • analyze radio advertising including: – radio time slots – effectiveness of commercial • identify and calculate the cost of radio commercials in various time slots • identify elements involved in preparation of a radio commercial • demonstrate the use of radio production techniques when planning and producing a radio commercial • present and evaluate own radio commercial.	Use of AIDA concept: attract attention, create interest, stimulate desire, induce action. Analyze radio ads: e.g., script types, live versus taped, length, repetition, voices.
Advertising on Television	• analyze television commercials including: – time slots – effectiveness of the commercial • identify and calculate the costs of television commercials in various time slots • demonstrate the use of television production techniques when planning and producing a television commercial: – storyboard preparation – use of equipment • present and evaluate own television commercial.	Use of AIDA concept: attract attention, create interest, stimulate desire, induce action. Camcorder-types and lengths of shots, lighting, production sequence.
Career Exploration	• investigate a variety of career opportunities in print and broadcast advertising • identify personal interests, talents and experiences as they relate to careers in print and broadcast advertising.	Define key terms related to career path/ladders. entry-level positions, mid-management, management positions.

MODULE M&M203: PROMOTION: VISUAL MERCHANDISING

Level: **Intermediate**

Theme: **Marketing Systems and Strategies**

Prerequisite: **Management and Marketing Basics (M&M101)**

Module Parameters: **None**

Visual merchandising helps to sell products at the point of purchase. Students become familiar with the different types of visual merchandising, how to construct attention-getting displays and what to look for when evaluating visual merchandising.

Curriculum and Assessment Standards

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
The student will:	*Assessment of student achievement will be based on:*	
• identify and explain basic visual merchandising concepts	• **Display Manual** using a choice of diagrams, pictures and/or video consisting of visual merchandising: – objectives – types – elements and principles – guidelines. *Assessment Tool* *Task Checklist: Visual Merchandising Manual (M&M203-1)* *Standard* *Level 2 in each applicable area*	20
• create a collection of display ideas for a calendar year	• **Yearly Visual Merchandising Planner for a Business.** Minimum of eight display ideas in the planner which represents a full year's visual merchandising plan. Ideas should include type of display, theme, merchandise, props, supplies to be used and a sketch showing the elements and principles of design being applied. *Assessment Tool* *Task Checklist: Personal Display Planner (M&M203-2)* *Standard* *Level 2 in each applicable task area*	20
• design and construct a merchandising display	• **Creation of an Interior and/or Exterior Display** for a specific organization/business. *Assessment Tool* *Visual Merchandising Assessment (M&M203-3)* *Standard* *Level 2 competencies in each section*	40

MODULE M&M203: PROMOTION: VISUAL MERCHANDISING (continued)

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
The student will:	*Assessment of student achievement will be based on:*	
• evaluate various forms of visual merchandising	• **Evaluation** of a minimum of three displays that demonstrate visual merchandising design techniques based on the criteria listed on the Visual Merchandising Observation Tool. *Assessment Tool* *Task Checklist: Visual Merchandising Observations (M&M203-4)* *Standard* *3 completed observations, Level 2 competencies for each*	10
• identify personal interests and opportunities as they relate to careers in visual merchandising	• **Career Profile** that includes job description, education/qualification requirements, employment opportunities, advancement potential and salary range. *Assessment Tool* *(to be developed)*	10
• demonstrate effort to develop basic competencies.	• observations of individual effort and interpersonal interaction during the instructional period, emphasizing: – managing learning – managing resources – teamwork and leadership – being innovative – demonstrating responsibility. *Assessment Tool* *Basic Competencies Reference Guide and any assessment tools noted above*	Integrated throughout

Concept	Specific Learner Expectations	Notes
Visual Merchandising	*The student should:* • describe what visual merchandising is and provide examples, illustrations and/or pictures of various displays	Linkages with Fashion Studies.

Concept	Specific Learner Expectations	Notes
	The student should:	
• Objectives	• explain how displays can influence the customer: – route traffic – catch attention – expand window theme – pleasant store environment – quick product identification – entice entry to store – reinforce store image – support sales presentations	
• Types	• examine the different types of visual merchandising displays and provide examples: – *interior* (open—gondola, shelving, racks, ledge, platform, etc.; closed—showcases and shadow boxes, architectural or built-up displays) – *exterior* (closed, semi-closed, open) – season (pre-season, runner, clearance) • indicate how the interior display(s) can be coordinated with exterior display(s) • discuss how ideas are generated for visual merchandising	Assess the effectiveness of several retail outlet displays.
• Display Ideas	• generate a list of display ideas for a variety of events and themes	Holiday themes, events, other displays, brainstorming with others.
Display Design • Elements	• identify and discuss the elements of design as it relates to visual merchandising: – use of lines—vertical, horizontal, curve, diagonal – use of shape—geometric, organic, positive, negative – use of colour—terminology, schemes, moods – background – use of three-dimensional space – use of weight, size and texture	Consider links with Design Studies and Communication Technology. Props versus products, foreground versus background.

Concept	Specific Learner Expectations	Notes
• Principles	*The student should:* • identify and discuss the principles of design as they relate to visual merchandising: – patterns—interface, stair step, gradation, pyramid, zig zag, repetition, radiation – balance, formal and informal – harmony and contrast – rhythm – proportion – emphasis – unity.	
Creating Displays • Guidelines	• apply basic guidelines when creating a display – use the KISS concept (Keep it Simple) – keep the customer's viewpoint in mind – use lighting to enhance the display – use props to enhance the merchandise and theme	Props can be built, bought or borrowed. Use and construct different kinds of props.
• Planning and Acting	• apply the steps in planning a display: – identify the objective – select theme, merchandise and location – compute cost of constructing display – assemble supplies and materials needed – prepare display area, merchandise and props for display – construct the display – maintain a display.	Clean windows, background and floor; merchandise neat and clean; props in good repair; maintain lighting fixtures.

Concept	Specific Learner Expectations	Notes
Evaluating Displays	*The student should:* • evaluate the effectiveness of the display: – location – design – theme – impact/appeal • recommend possible changes to the process of display creation and the display itself.	
Career Exploration	• investigate a variety of career opportunities in visual merchandising • identify personal interest, talents and experiences as they relate to careers in visual merchandising.	Define key terms related to career path/ladders, entry-level positions, mid-management, management positions.

MODULE M&M204: RETAIL OPERATIONS

Level: **Intermediate**

Theme: **Marketing Systems and Strategies**

Prerequisite: **None**

Module Parameters: **None**

Policies and procedures for purchasing, receiving, stocking and selling goods are necessary in a retail store to ensure goods get onto the floor in the right quantity, at the right time and at the right price. Students look at retail operations that are typically performed off the selling floor, away from customers. The school store offers students an excellent on-site lab for most concepts in this module.

Curriculum and Assessment Standards

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
The student will:	*Assessment of student achievement will be based on:*	
• research and report on a particular store's policies and practices	• **Interview of** a retail manager/owner addressing the following retail store policies and practices: – sales and service policies – credit and collection – store security – human resources – recordkeeping. *Assessment Tool* *(to be developed)*	15
• act as a buyer when purchasing goods and demonstrate procedures for ordering	• **Role-play** of the part of a buyer in a simulation or work situation. Use buying strategies and systems to accurately complete three purchase requisitions and/or order forms for different suppliers. *Assessment Tool* *(to be developed)*	10
• develop a system to use after goods have been received	• **Procedures Manual** consisting of the systems and strategies to follow after goods have been received. Manual should include: – receiving dock procedures – types of checks—direct, blind, quality, spot – marking of goods – stock of goods on and off the selling floor. *Assessment Tool* *Visual Merchandising Assessment*	25

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
The student will:	*Assessment of student achievement will be based on:*	
• describe pricing strategies used by retailers	• **Concept Test** consisting of questions on pricing strategies including: – calculate markups based on cost and retail – calculate markdowns – breakeven point – pricing policies – tagging merchandise. *Assessment Tool* *(to be developed)*	15
• demonstrate effective use of systems and strategies to control goods	• **Completion of an Inventory** consisting of counting and calculating goods in stock using one of the methods of inventory (fifo, lifo or perpetual). Stock merchandise on or off the selling floor. *Assessment Tool* *(to be developed)*	10
• verify and process invoices for payment of goods received	• **Concept Test** on the systems and strategies used for payment including: – verification of invoices – calculation of due dates – calculation of discounts and net invoices – recording of payment in cash journal – payment of invoice by cheque. *Assessment Tool* *(to be developed)*	15
• identify personal interests related to careers in store operations including buying, receiving, stocking, storing and payment of merchandise	• **Career Profile** that includes job description, education/qualification requirements, employment opportunities, advancement potential and salary range. *Assessment Tool* *(to be developed)*	10
• demonstrate effort to develop basic competencies.	• observations of individual effort and interpersonal interaction during the instructional period, emphasizing: – managing learning – managing resources – being innovative – teamwork and leadership. *Assessment Tool* *Basic Competencies Reference Guide and any assessment tools noted above*	Integrated throughout

Concept	Specific Learner Expectations	Notes
Store Systems and Strategies	*The student should:* • examine store policies for a variety of retail stores and describe the following policies: – sales and services – credit and collection – store security – human resources – recordkeeping.	
Systems and Strategies for Buying Goods	• describe the duties of a buyer • identify how goods are classified: – type of goods - convenience, impulse, shopping specialty and staple – brand names - national, private, generic • identify and discuss the product and fashion life cycle • research buying data/sources: – supplier information, sources, reputation – product classification, price, availability • use purchase order/requisition forms when buying goods • explain what the following shipping terms mean and what impact they have on the buyer: – FOB factory – FOB destination – FOB shipping point.	Good linkage with Information Processing: use of data base, spreadsheet.
Systems and Strategies for Receiving Goods	• discuss procedures and methods used for receiving goods (receiving, checking, storage, stocking) • examine what remedies the buyer has or what actions can be taken for: – damage/breakage – substitution/poor quality – overage/shortage – lost/misplaced order.	Signing of delivery receipt or packing slip for verification of number of cartons or boxes shipped. Direct checks versus indirect (blind) checks against purchase orders, packing slips or invoices.

Concept	Specific Learner Expectations	Notes
Systems and Strategies for Pricing and Marking	*The student should:* • calculate the markup of goods based on cost and retail price • calculate breakeven point • identify and discuss what type of price tags should be used • identify pertinent information to be included in price tags (including cost codes) • identify how and when goods are marked down • calculate the markdown of goods • describe the application and effect of pricing policies: – market penetration (low entry) – skimming (high entry) – comparable (competitive range) – flexible (one-price, variable) – relative (desired level).	Retail price, cost codes, department, season purchased, vendor, etc.
Systems and Strategies for Controlling Goods	• identify the different methods of inventory control available • demonstrate the use of various methods • explain and calculate stock turnover.	For example, fifo, lifo, perpetual.
Systems and Strategies for Storing Goods	• discuss stocking and storage consideration from the buyer's perspective when orders are received: – sales floor – backup stock off the selling floor – warehouse.	
System for Payment of Goods	• verify the accuracy of invoices • identify the different types of discounts available to retailers • calculate discounts and the net totals of invoices • record the purchases of goods received • pay invoices by cheque or cheque requisition.	Trade, cash etc.

MODULE M&M204: **RETAIL OPERATIONS** (continued)

Concept	Specific Learner Expectations	Notes
Career Exploration	*The student should:* • investigate a variety of career opportunities in store operations including buying, receiving, stocking and storing and payment of merchandise • identify personal interests, talents and experiences as they relate to careers in retail operations.	Define key terms related to career path/ladders, entry-level positions, mid-management, management positions.

MODULE M&M205: OFFICE SYSTEMS I

Level: **Intermediate**

Theme: **Information Management Systems and Strategies**

Prerequisites: **Keyboarding II (INF202)**
Word Processing II (INF204)

Module Parameters: **Access to electronic office equipment**

Today's office has access to technologies that enhance communication and support productivity. This module focuses on strategies and procedures in the office environment and managing processes and protocols related to electronic communication equipment and business travelling arrangements.

Curriculum and Assessment Standards

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
The student will:	*Assessment of student achievement will be based on:*	
• analyze a selected office environment	• **Report** that includes: – rationale for how the office is organized – how the office focuses on quality – strategies used to increase productivity – use of a minimum of three different types of electronic office equipment. *Assessment Tool* *(to be developed)*	10
• demonstrate use of strategies, procedures, and electronic equipment within office environments	• **Practical Lab Experience** in a simulated or actual office. Show evidence of efficient use of three different electronic office equipment. *Assessment Tool* *(to be developed)*	40
• describe procedures for managing electronic communications	• **Office Manual** consisting of policies and procedures for electronic communications equipment including: – telephone – facsimile – electronic mail /Internet. *Assessment Tool* *(to be developed)*	20

MODULE M&M205: OFFICE SYSTEMS I (continued)

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
The student will:	*Assessment of student achievement will be based on:*	
• make travel arrangements for a business trip	• **Travel Project** consisting of creating a business trip scenario and making arrangements for the trip including: – gathering necessary information – making decisions regarding who to book through, transportation and accommodations – special attention to international travel – preparation of an itinerary – preparation of budget and expense claims. *Assessment Tool* *(to be developed)*	20
• identify personal interests related to office careers	• **Career Profile** that includes job description, education/qualification requirements, employment opportunities, advancement potential and salary range. *Assessment Tool* *(to be developed)*	10
• demonstrate effort to develop basic competencies.	• observations of individual effort and interpersonal interaction during the instructional period, emphasizing: – managing learning – managing resources – acting ethically – communication – demonstrating responsibility *Assessment Tool* *Basic Competencies Reference Guide and any assessment tools noted above*	Integrated throughout

Concept	Specific Learner Expectations	Notes
Office Environment	*The student should:* • investigate how various business offices are organized with respect to: – organizational structure – priorities/philosophy – design and layout • identify the components of a work area: – hardware – software – telecommunications – resources/references – ergonomics • describe how the office supports a commitment to quality management: – focus on customer – accuracy, completeness, simplicity – using references/research • identify and assess strategies that increase personal productivity: – time and work management – setting priorities – resource management • identify types of electronic office equipment used in offices.	Select from offices of: various sizes (e.g., home business, large business, community organization, telecommuting; various sectors of the economy (e.g., oil, service industry, real estate, insurance, health industry, auto dealership). Telephones, photocopiers, calculators, electronic mail, facsimiles, dictaphones.
Procedures for Managing Electronic Communications	• describe the various communication systems available to business: – telephone – voice messaging systems – electronic mail – facsimiles – Internet – teleconferencing • examine a variety of communication procedures and protocols that are practised for each system. (e.g., answering phones promptly, delivering fax messages promptly, answering electronic mail messages immediately) • apply efficient communication procedures and protocols when using a variety of electronic office equipment.	

Concept	Specific Learner Expectations	Notes
Managing Travel Arrangements	*The student should:* • gather the necessary information to arrange a business trip • make choices regarding – how to handle bookings and reservations – mode of transportation – accommodations • describe the special arrangements necessary when travelling internationally • prepare budgets and expense claims for business trips • prepare itineraries for business trips.	Self, travel agent, consumer group.
Professionalism	• demonstrate proper personal grooming and dress appropriate to the office environment • investigate issues related to ethics and laws regarding the use of electronic office equipment.	For example, copyright laws.
Career Exploration	• investigate a variety of career opportunities related to the office work • identify personal interests, talents and experiences as they relate to office careers.	Define key terms related to career path/ladders, entry-level positions, mid-management, management positions.

MODULE M&M206: COMMUNICATION STRATEGIES II

Level: **Intermediate**

Theme: **Information Management Systems and Strategies**

Prerequisites: **Communication Strategies I (M&M103)**
Workstation Operations (INF101; recommended)
Keyboarding I (INF102; recommended)

Module Parameters: **Access to computer workstation**

This module continues to improve students' basic oral and written communications strategies that are necessary for efficient, effective management of information. The focus is on technical writing strategies and composing at the computer when preparing informal business reports and proposals.

Curriculum and Assessment Standards

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
The student will:	*Assessment of student achievement will be based on:*	
• critique informal business reports	• **Read and Critique** a minimum of three informal reports in an area of interest in regards to content organization, clarity, completeness and use of proper sentence structure, grammar, spelling and punctuation. Suggest ways the report could be improved. *Assessment Tool* *(to be developed)*	15
• demonstrate use of the writing process when composing business reports or proposals	• **Write** a minimum of two informal reports in an area of interest. Show evidence that the writing process was followed in its preparation (prewriting, writing, revising, proofreading). *Assessment Tool* *(to be developed)*	70
• deliver an oral report using effective communication strategies	• **Oral Presentation**: minimum five-minute presentation on a designated topic. Show evidence of effective oral communication strategies including non-verbal skills. *Assessment Tool* *(to be developed)*	15

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
The student will: • demonstrate effort to develop basic competencies.	*Assessment of student achievement will be based on:* • observations of individual effort and interpersonal interaction during the instructional period, emphasizing: – managing learning – managing resources – teamwork and leadership – being innovative – demonstrating responsibility. *Assessment Tool* *Basic Competencies Reference Guide and any assessment tools noted above*	Integrated throughout

Concept	Specific Learner Expectations	Notes
Preparing to Write Technical Reports	*The student should:* • examine the types of business situations that require technical reports: – investigative report, analysis of a particular problem – evaluation of an existing situation or a proposed action – response to a situation or incident – progress being made on a long-term project – proposal, persuades the reader to adopt a change • distinguish between the need for informal and formal reports in business environments: – situation – audience – details of investigation • compare the characteristics between informal and formal writing including: – writing styles – length and layout.	Select from offices of: various sizes (e.g., home business, large business, community organization, telecommuting; various sectors of the economy (e.g., oil, service industry, real estate, insurance, health industry, auto dealership).

MODULE M&M206: COMMUNICATION STRATEGIES II (continued)

Concept	Specific Learner Expectations	Notes
Writing Effective Informal Reports	*The student should:* • research and use *prewriting* strategies when preparing informal reports: – identify the purpose – list key points – discussion of finding • outline the sections of an informal report: – summary – introduction – discussion – conclusion(s) – recommendations – appendices—charts, supporting data, diagrams • draft the technical report using the following strategies: – write in an unbiased manner – substantiate opinions – be specific – construct and attach any appendices • identify and use revising strategies such as asking questions like the following: – is the report properly focused? – is the report complete? – are conclusions and recommendations logical with the findings? – are there any inconsistencies or contradictions? • identify and use *proofreading* strategies: – proofread for facts, dates, names, figures and other statistical information – proofread for sentence structure, grammar, spelling, punctuation and format.	Use word-processing programs, templates.

Concept	Specific Learner Expectations	Notes
Oral Communications	*The student should:* • give oral instructions in person or on a recording to enable another person to complete a specified task • receive instructions from a person or on a recording and develop a plan to complete a specified task • rehearse a prepared oral or written report on a business topic using effective oral communication strategies.	

MODULE M&M207: **INFORMATION HIGHWAY II**

Level: **Intermediate**

Theme: **Information Management Systems and Strategies**

Prerequisite: **Information Highway I (M&M104)**

Module Parameters: **Access to computer workstation and the Internet**

The Internet serves as the largest world accessible information and data communications computer network. This module assists students develop efficient network skills in accessing and communicating information.

Curriculum and Assessment Standards

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Weighting (%)
The student will:	*Assessment of student achievement will be based on:*	
• demonstrate ability to navigate the Internet	• **Internet Project** consisting of: – describing Internet structures – comparing and accessing Internet protocols – accessing files via menus or addresses – use troubleshooting techniques. *Assessment Tool* *(to be developed)*	30
• demonstrate ability to search the Internet using a variety of Internet services and resources	• **Research Project** consisting of researching a specific topic through the use of the Internet including: – using a variety of programs (FTP, Gopher, WWW) – using a variety of methods and services when searching the Internet (Fads, books, other users, Arch, Veronica, WAS) – demonstrating proper etiquette – cut/paste/edit and format collected data. *Assessment Tool* *(to be developed)*	60
• consistently apply appropriate workstation routines	• **Meeting** or exceeding "acceptable" standards in appropriate workstation routines. *Assessment Tool* *(to be developed)*	10

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Weighting (%)
The student will: • demonstrate effort to develop basic competencies.	*Assessment of student achievement will be based on:* • **Observation** of individual effort and interpersonal interaction during the instructional period, emphasizing: – managing learning – managing resources – acting ethically – communication – demonstrating responsibility. *Assessment Tool* *Basic Competencies Reference Guide and assessment tools noted above*	Integrated throughout

Concept	Specific Learner Expectations	Notes
Navigating the Internet	*The student should:* • describe/illustrate Internet structure: – geographic coverage/countries – network hardware, software, interface links • compare hardware/software requirement • compare DOS/Macintosh/other PC with UNIX host • explain/illustrate a client/server model • describe and compare Internet protocols including advantages and when to use each: – TCP/IP (transmission control protocol/Internet protocol), Ethernet, Slip (serial line Internet protocol), PPP connections (point to point protocol) – Telenet, Gopher, FTP, Lynx, World Wide Web, Veronica, Archie, Mosaic, Netscape, E-mail, WAIS (Wide Area Information Server) and other browsers and available software • contrast/access ftp, http, html, ASCII, binary, text, graphic file types • demonstrate the ability to use bridges, routers and gateways • identify and use troubleshooting techniques.	NSFNET in the US; CERN, Switzerland. Kermit, XModem, YModem, ZModem.

MODULE M&M207: INFORMATION HIGHWAY II (continued)

Concept	Specific Learner Expectations	Notes
Searching the Internet	*The student should:* • apply proper Internet on-line netiquette when using the Internet • access and use a variety of programs to search for information: – Telenet, FTP, Gopher, World Wide Web • identify and use a variety of resources for accessing information such as: – Usenet's FAQs (Frequently Asked Questions) – other Internet users – books that provide list of information (e.g., *The Internet Directory*) – using appropriate search words • search for specific information using a variety of services (browsers) that help you find files in archives • cut/paste/edit and format collected data.	Archie, Veronica, WAIS, Cello, WinWeb.
Workstation Management	• apply efficient workstation position and routines that encourage: – good health and safety (posture, positioning of hardware and furniture) – security for hardware, software, supplies and personal work • demonstrate efficient and appropriate use of time and resources in terms of: – start-up procedures – organization of work area – closing procedures • apply effective decision-making strategies when using the Internet • use related terminology to describe basic protocols, processes and tools.	

MODULE M&M208: RECORDS MANAGEMENT I

Level: **Intermediate**

Theme: **Information Management Systems and Strategies**

Prerequisite: **None**

Module Parameters: **Access to computer workstation with database software if completing this module electronically**

Individuals and organizations need recorded information that is accurate, accessible and in the right format in order to make appropriate decisions. This module provides an opportunity to develop basic records management skills for a manual records system emphasizing alphabetical coding procedures.

Curriculum and Assessment Standards

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
The student will:	*Assessment of student achievement will be based on:*	
• identify and describe basic filing/records management concepts	• **Concept Test** consisting of questions related to planning and organizing a filing/records management system manually or electronically and creating and using a manual or electronic alphabetic records management system. *Assessment Tool* *(to be developed)*	30
• demonstrate ability to plan, create and use an alphabetic filing/records management system	• **Records Management Project (Manual or Electronic)** consisting of: – planning and organizing a system for alphabetic records including a summary justifying the plan – creating the alphabetic file/records management system – using the system through storing, retrieving and/or manipulating records. *Assessment Tool* *(to be developed)*	60
• identify personal interests and opportunities as they relate to careers in records management	• **Career Profile** that includes job descriptions, education/qualification requirements, employment opportunities, advancement potential and salary range. *Assessment Tool* *(to be developed)*	10

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
The student will: • demonstrate effort to develop basic competencies.	*Assessment of student achievement will be based on:* • observations of individual effort and interpersonal interaction during the instructional period, emphasizing: – managing learning – managing resources – teamwork and leadership – being innovative – demonstrating responsibility. *Assessment Tool* *Basic Competencies Reference Guide and any assessment tools noted above*	Integrated throughout

Concept	Specific Learner Expectations	Notes
Planning and Organizing Records	*The student should:* • define records and describe why records are kept • identify a variety of records management systems • compare a manual filing system with an electronic records system • investigate laws regarding use and access to records management systems • identify potential problems associated with records management systems • identify the four main types of filing methods (alphabetic, numeric, subject, geographic) • analyze appropriate procedures to create a records management system: – objectives and goals – assessment of system needed (types of information to be stored, best format for storing information): • centralized or decentralized • manual or electronic • filing method	Local filing and records management system currently in use such as video store or doctor's office. The purpose of keeping records, establishing filing/record storage systems.

Concept	Specific Learner Expectations	Notes
	The student should: – procedures for using the system (what records to keep, who will keep them, where to store records before filing, when to file, when to purge).	
Creating an Alphabetic Filing/Records Management System	• identify records that are managed alphabetically • examine the steps to be completed when filing (inspecting, indexing, sorting, coding and storing) • describe the function of cross-referencing • practise using the rules for alphabetic filing by indexing a variety of records and filing them • identify and describe filing equipment and supplies necessary to create and maintain an efficient manual filing system.	
Storing and Monitoring Alphabetic Records	• store new data or records in a filing/records management system • retrieve records from a manual filing system • analyze strategies to prevent records from being misfiled or managed.	
Career Exploration	• investigate a variety of career opportunities related to records management • identify personal interests, talents and experiences as they relate to careers in records management.	Define key terms related to career path/ladders, entry-level positions, mid-management, management positions.

MODULE CURRICULUM AND ASSESSMENT STANDARDS: ADVANCED LEVEL

The following pages define the curriculum and assessment standards for the advanced level of Management and Marketing.

> Advanced level modules demand a higher level of expertise and help prepare students for entry into the workplace or a related post-secondary program.

Module M&M301: The Business Organization F.3
Module M&M302: Business in the Canadian Economy F.9
Module M&M303: Business in the Global Marketplace F.13
Module M&M304: Promotion: Sales Techniques F.17
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MODULE M&M301: THE BUSINESS ORGANIZATION

Level: **Advanced**

Theme: **Business Management Systems and Strategies**

Prerequisites: **Management and Marketing Basic (M&M101)**
Managing for Quality (M&M201; recommended)

Module Parameters: **None**

Businesses today need to create a globally competitive environment to compete successfully in the marketplace. In this module, students explore organizational structure, management theories and organizations as working units. Students are encouraged to discuss and develop their own beliefs of what successful organizations might look like in the future.

Curriculum and Assessment Standards

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
The student will:	*Assessment of student assessment will be based on:*	
• research and assess local examples of different types of organizational structures	• **Organizational Charts** of local businesses/ organizations that present the four main organizational structures (functional, line and staff, geographical and matrix). Assess each organization's levels of management and channels of communications. *Assessment Tool* *(to be developed)*	15
• analyze the different theories of management and forecast future trends	• **Analysis** of a minimum of six management theories each consisting of a summary, best organizational structure(s) for each theory and personal views regarding each. *Assessment Tool* *(to be developed)*	30
• examine the roles and responsibilities for managers in each of the functional areas: – research and development – production – finance – marketing – purchasing – administration – human resources	• **Concept Test** consisting of questions related to the roles and responsibilities of managers in the functional areas of research and development, production, finance, marketing, purchasing, administration and human resources. *Assessment Tool* *(to be developed)*	15

MODULE M&M301: THE BUSINESS ORGANIZATION (continued)

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
The student will:	*Assessment of student assessment will be based on:*	
• research why businesses succeed/fail and how organizations measure their success/failure	• **Research Report** consisting of a minimum of five examples of businesses that have succeeded and/or failed. Describe how these businesses rate success/failure and measure performance. *Assessment Tool* *(to be developed)*	20
• evaluate a current challenge facing managers in today's society	• **Presentation** of a current issue facing managers consisting of identifying the issues, the reason it is a challenge to managers, any controversy surrounding the issue, possible solutions to resolve the issue, personal views on the issue. *Assessment Tool* *(to be developed)*	10
• identify personal interests and opportunities as they relate to careers in large organizations	• **Career Profile** that includes job description, education/qualification requirements, employment opportunities, advancement potential and salary range.	10
• demonstrate effort to develop basic competencies.	• **Observation** of individual effort and interpersonal interaction during the instructional period, emphasizing: – managing learning – managing resources – being innovative – acting ethically – communication. *Assessment Tool* *Basic Competencies Reference Guide and any assessment tools noted above*	Integrated throughout

Concept	Specific Learner Expectations	Notes
Organizational Structures	*The student should:* • analyze the types of organizational structures including: – functional (organized by functions) – line and staff (organized by product line) – geographical (organized by region) – committee and matrix (organized by teams) • diagram a firm's organization for each type of structure • examine the levels of management in the managerial hierarchy for each structure • describe the channels of communications and flow of information for a variety of organizations.	Production, accounting, divisional, by product west, central, eastern project-oriented. Use organizational charts. Top-level, mid-level, supervisory.
Management Theories	• research and critiques popular theories of management including: – classical – scientific management – management by objectives – management by wandering around – Japanese model – total quality management – site-based management – future trends • determine and justify the best organizational structure(s) to use for each theory • determine and justify the theory (or combination of theories) that best fit the needs of present-day society.	

Concept	Specific Learner Expectations	Notes
Management Functions	*The student should:* • research management roles in the following functional areas and explain management tasks and responsibilities in each: – research and development – production/manufacturing – finance/accounting – marketing – purchasing – administration – human resources • explain how each function fits within the organization, key components of the function and characteristics of successful/effective members.	Top-level, mid-level, supervisory (line).
Indicators of Success	• identify common reasons why organizations succeed/fail: – business organizations – retail organizations • describe how an organization can rate its success • describe how performance (owner, manager, support team) can be measured and recognized.	For example, profit, customer/client loyalty, employee commitment/loyalty.
Professional Conduct of Organizations	• identify and analyze ethical challenges that affect organizations and personnel: – interpersonal interactions within the organization – company policies and protocols – customers interactions – business associates and competitors • investigate examples of how social responsibility has been addressed/not addressed by an organization.	Unemployment; human rights; environmental concerns regarding land, air, water.

Concept	Specific Learner Expectations	Notes
Career Exploration	*The student should:* • investigate a variety of career opportunities related to large organizations • identify personal interests and experiences as they relate to careers in large organizations.	Define key terms to career path/ladders, entry-level positions, mid-management, upper management.

MODULE M&M302: BUSINESS IN THE CANADIAN ECONOMY

Level: **Advanced**

Theme: **Business Management Systems and Strategies**

Prerequisite: **Management and Marketing Basics (M&M101)**
Managing for Quality (M&M201; recommended)

Module Parameters: **None**

This module helps students expand and relate their knowledge of economics to how decisions are made in business within their communities, the province, nationally and internationally.

Curriculum and Assessment Standards

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
The student will:	*Assessment of student assessment will be based on:*	
• examine basic economic terms and concepts	• **Analysis** of a minimum of three case studies related to basic economic systems and strategies. *Assessment Tool* *(to be developed)*	20
• demonstrate knowledge of the Canadian economy	• **Presentation** consisting of: – explanation of Canada's mixed economy – goals of the Canadian economic system – example of goods and services provided in the public and private sector – circular flow – role of profit – time line showing Canada's business cycle over the past 50 years and actions by the government to stabilize the economy – explanation of how income is earned and spent – role of the Bank of Canada and other financial institutions – construct and explain supply and demand graphs *Assessment Tool* *(to be developed)*	50

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
The student will:	*Assessment of student assessment will be based on:*	
• evaluate an economic issue challenging Canadian businesses	• **Report** consisting of a minimum of four pages (1000 words) which: – identifies the issues – summarizes the concerns of all sides – recommends course of action. *Assessment Tool* *(to be developed)*	30
• demonstrate effort to develop basic competencies.	• **Observation** of individual effort and interpersonal interaction during the instructional period, emphasizing: – managing learning – managing resources – being innovative – acting ethically – communication. *Assessment Tool* *Basic Competencies Reference Guide and any assessment tools noted above*	Integrated throughout

Concept	Specific Learner Expectations	Notes
Economic Systems and Strategies	*The student should:* • recognize the important role of economics in our personal lives • examine how scarcity imposes the need to make choices by the individual and by society • relate how all choices are "trade-offs" or "opportunity costs" • cite examples of opportunity costs • review the factors of production (land, labour, capital) • evaluate goods and services within the community and determine who produces and consumes them; include examples from the: – public sector – private sector	See M&M101.

Concept	Specific Learner Expectations	Notes
	The student should: • examine the key decisions of consumers (what to purchase? how many to purchase, at what cost?) • examine the key decisions of producers (what to produce? how many to produce? with what resources? what cost?) • analyze the interrelationship of consumers and producers • explain key economic indicators: – Gross Domestic Product (GDP) – personal income – consumer price index – unemployment rates – stock/bond markets • compare the different types of economic systems listing the characteristics, advantages and disadvantages of each: – market – command – mixed.	
Canadian Economic System and Strategies	• examine the goals of our Canadian economic system • explain the role of profit in our mixed economy • examine the circular flow of our economy and its effects on: – consumers – government – business – Gross Domestic Product • describe the business cycle during times of prosperity and depression • explain actions the government might take to stabilize our economy • explain how income is earned and spent • describe the role of the Bank of Canada and other banking institutions in determining interest rates and the relationship interest rates have on purchases, investments, etc.	

Concept	Specific Learner Expectations	Notes
Supply, Demand, Price	*The student should:* • examine the laws of supply and demand • analyze the effects of supply and demand on price in a variety of market scenarios • identify recent examples of how the market has made adjustments to price and supply of various goods and services.	Elasticity of supply and demand, external influences, government influences. With and without competition, with and without marketing/ advertising initiatives.
Economic Issues Challenging Canadian Business	• identify key issues that challenge Canadian business (community, region, province, nation, international) • investigate one of these issues in depth.	Economic growth versus environmental (air, land, water) issues, regional disparity and diversity, changing work force, dealing with unemployment.

MODULE M&M303: **BUSINESS IN THE GLOBAL MARKETPLACE**

Level: **Advanced**

Theme: **Business Management Systems and Strategies**

Prerequisites: **Managing for Quality (M&M201; recommended)**
Business in the Canadian Economy (M&M302; recommended)

Module Parameters: **None**

Recent world economic and political changes have increased awareness of potential business opportunities abroad. This module introduces the opportunities and challenges that confront business people in establishing a global business operation.

Curriculum and Assessment Standards

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
The student will:	*Assessment of student assessment will be based on:*	
• compare existing international business ventures with both developing and developed nations	• **Research** a minimum of five businesses and report on the following: – name of company – products and/or services – organizational structure (multi-national, franchise, etc.) – management and marketing systems and strategies – constraints and considerations identified when doing business with the foreign nation – local challenges of resulting from global competition. *Assessment Tool* *(to be developed)*	15
• examine existing legislation that affects global ventures	• **Concept Test** consisting of questions related to global business legislation, regulations and organizations including: – provincial and Canadian legislation – trading blocs and agreements – trading policies – processes for export – basic concepts of international trade.	15

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
The student will:	*Assessment of student assessment will be based on:*	
• analyze existing global ventures	• **Analysis** of a minimum of five case studies using videos, magazines articles, books, and or newspaper clippings which represent the use of different management and marketing strategies in the global marketplace. *Assessment Tool* *(to be developed)*	20
• research global entrepreneurial opportunities with both a developed and developing nation	• **Research Project** on the global marketplace. See Global Marketplace Research Project. *Assessment Tools* *Global Research Project* *Global Research Assessment Tool*	50
• demonstrate effort to develop basic competencies.	• **Observation** of individual effort and interpersonal interaction during the instructional period, emphasizing: – managing learning – managing resources – being innovative – acting ethically – communication. *Assessment Tool* *Basic Competencies Reference Guide and any assessment tools noted above*	Integrated throughout

Concept	Specific Learner Expectations	Notes
Global Business Opportunities	*The student should:* • review global marketplace terms	For example, sanctions, imports, exports, tariffs, embargoes.
	• identify and describe a variety of international businesses including organizational structures and manager roles and responsibilities for foreign companies in Canada; Canadian companies abroad	Conglomerates, multi-national, small business, franchise foreign subsidiaries, joint ventures, off shore.

Concept	Specific Learner Expectations	Notes
	The student should: • discuss the pros and cons of various forms of international business opportunities.	Use of SWOT (strengths, weaknesses, opportunities, threats).
Legislation and Policies	• investigate existing provincial legislation/regulations that promote or hinder trade within Canadian • investigate Canadian and other nation legislation/regulations that promote or hinder trade with Canada • explain and describe the: – World Trade Organization – Canada/US Free Trade Agreement – North American Free Trade Agreement – European Economic Community – Asian Pacific Rim – other international trading agreements • examine the role of the World Bank in international business • describe a "projectionist" policy and the historical effect it has had on countries • discuss/debate Canada/U.S. actions regarding: – tariffs (import and export tax) – dumping • prepare an organization chart, functions and duties, description, and examples of: – export department – export manager – commission agent • describe the basic concepts of international trade from a fiscal and economic position: – balance of trade – balance of payments – exchange rate (floating, devaluation, revaluation) – counter trade.	What are the strengths and weaknesses of each bloc? Use of SWOT (strengths, weaknesses, opportunities, threats).

Concept	Specific Learner Expectations	Notes
Strategies for Operating in the Global Marketplace	*The student should:* • describe the global competitive forces being exerted on the Canadian business community • explain how a Canadian business operation might determine its "niche" in the international marketplace • research and summarize how management organizes for an effective international strategy: – development of new products/services – maximize advanced technology capability (communication, research, production) – using resources from the local community – identify local economic political, social and environmental issues – clarify profit targets • research and elaborate on possible involvement opportunities on the international business scene (provide examples and identify management's role): – exporting – importing (directly/indirectly) – licensing (licensee/licenser) – franchising (franchisee/franchiser) – foreign marketing – foreign production and marketing.	Trading blocs, telecommunications. How is the business unique in the global marketplace? Students may want to research international marketing blunders. Use of local personnel (e.g., translators) who know the local market can help make decisions regarding the market, transportation, advertising, sales, and production, use of trade commissioners.
Constraints and Conditions	• research and assess managerial considerations in a foreign country; e.g., – geographical conditions – economic conditions – social conditions – political conditions – cultural differences – environmental conditions • contrast risks/challenges to opportunities and indicate on what basis a positive decision would be made to proceed with a foreign venture • describe how management practices differ in the global marketplace in relation to: – leadership practices – organization structure – employee motivation levels/incentives – quality standards.	

MODULE M&M304: PROMOTION: SALES TECHNIQUES

Level: **Advanced**

Theme: **Marketing Systems and Strategies**

Prerequisite: **None**

Module Parameters: **None**

Salespeople are needed throughout the marketing process. Personal selling is required to market various types of goods and services. In this module, students learn techniques for success in selling.

Curriculum and Assessment Standards

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
The student will:	*Assessment of student assessment will be based on:*	
• critique salespersons and customers during the selling process	• **Observations**: Summarize the characteristics of the salesperson, note level of customer satisfaction and present constructive feedback on how presentations could be improved for two presentations from each of the following categories: – live – video – cases. *Assessment Tool* *Sales Presentation Assessment (M&M304-1)* *Standard* *Level 3 competencies*	20
• develop and demonstrate proper sales techniques	• **Sales Presentation**: plan, present and assess a person-to-person sales presentation using a product that can be demonstrated. Include all steps of the selling process. See Assessment Tool for detailed criteria. *Assessment Tool* *Sales Presentation Planning Assessment (M&M304-1)* *Standard* *Level 2 competencies in each section*	70
• identify personal interests and opportunities as they relate to careers in sales	• **Career Profile** that includes job description, education/qualification requirements, employment opportunities, advancement potential and salary range. *Assessment Tool* *(to be developed)*	10

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
The student will: • demonstrate effort to develop basic competencies.	*Assessment of student assessment will be based on:* • **Observation** of individual effort and interpersonal interaction during the instructional period, emphasizing: – managing learning – managing resources – being innovative – acting ethically – communication. *Assessment Tool* *Basic Competencies Reference Guide and any assessment tools noted above*	Integrated throughout

Concept	Specific Learner Expectations	Notes
The Salesperson	*The student should:* • define selling and discuss the role of the salesperson in: – the buying and selling process – selling self, the products/services, the business – human relations • discuss the effect of ethical and legal considerations on the role of the salesperson • identify personality traits that are needed by salespeople and indicate why they are important • list characteristics that customers expect to find in a salesperson and indicate: – why they are important – why they can have either a positive or negative effect • comment on what is required in a successful sales presentation.	

MODULE M&M304: PROMOTION: SALES TECHNIQUES (continued)

Concept	Specific Learner Expectations	Notes
Satisfying Customers	*The student should:* • review why people buy • review different customer types • describe what produces satisfaction when making a personal purchase: – evaluation of alternatives – making the purchase – re-evaluating the purchase.	See Quality Customer Service (M&M102).
Steps of a Sale		
• Pre-approach	• describe how a salesperson prepares for the customer: – customer characteristics/motives – product/service information • gather and analyze information related to prospective customers and product information	Practise sale techniques through role-playing.
• Approach	• explain how the welcome statement can help get attention and establish customer rapport	
• Determining Customer Needs and Wants	• comment on the effectiveness and timing used by the salesperson to identify the customer needs and wants: – observe customer – selling statement(s) – ask question(s) – listen to customer • develop a series of questions to determine the customer's needs	
• Planning the Presentation	• indicate the importance of determining the type of customer and how the sales presentation is tailored to encourage the customer • explain how the salesperson can recognize customer buying signals • suggest possible sales activities/responses for customer personality types • discuss the use of sensory appeal in sales demonstrations and how it is effective	Decided, undecided, just looking, friendly, know-it-all, silent, deliberate. Sensory appeal—appeal to the five senses: taste, touch, sight, hearing, smell.

Concept	Specific Learner Expectations	Notes
	The student should:	
	• identify other techniques that are used by salespersons to encourage customers	
	• make a list of at least 10 unique selling points (USP) for a product	
	• turn product features or USPs into customer benefits	
• Handling Customer Objections	• explain what a salesperson can do to counteract customer – excuses – objections	
	• discuss possible techniques for answering objections and indicate under what circumstances they could be appropriately used as an answering method	Question, yes, but, superior point, direct-denial, boomerang, third-party, demonstration, close-on-an objection.
	• prepare and a variety of objections that customers may raise and describe how to overcome these objections effectively	
• Closing the Sale	• describe how a natural close to the sale can be achieved by including the following alternatives: – stop demonstrating/showing the product – narrow the selection – discuss ownership – ask to buy (will this be cash or charge) – determine why there is reluctance – be confident	
	• discuss the conditions under which the salesperson determines the appropriate time to close the sale	
	• explain the purpose of the trial close and how it can be included in the sales discussion	
	• list a variety of closing techniques and describe the circumstances that would best support each	Obtain small favourable decisions. Reinforce added decisions. Seek frequent agreement. Narrow the choice. Assumption (will this be cash or charge?). Offer a premium. Last-chance-to-buy.
	• discuss lost sales, errors in closing a sale, and preparing for the next sale	

Concept	Specific Learner Expectations	Notes
	The student should: • identify the techniques that can be used to support more sales (currently, in the future) • demonstrate the mechanics of closing – ringing in the sale – wrapping/bagging merchandise • taking leave.	For example, suggestion selling (ask if customer would like a tie with a suit or sell an extended warranty with an automobile).
Non-selling Duties	• review how sales support activities link to success in sales: – stock-keeping – housekeeping – building displays – preventing loss/waste – directing customers – handling complaints – following store policy.	See Quality Customer Service (M&M102).
Career Exploration	• investigate a variety of career opportunities in sales • identify personal interests, talents and experiences as they relate to careers in sales	Define key terms related to career path/ladders, entry-level positions, mid-management, management positions.

MODULE M&M305: DISTRIBUTING GOODS AND SERVICES

Level: **Advanced**

Theme: **Marketing Systems and Strategies**

Prerequisite: **None**

Module Parameters: **None**

Having products and services at the right place when customers demand them is an essential component of the marketing mix. Students explore the channels of distribution and modes of transportation used to direct goods from the producer to the ultimate consumer.

Curriculum and Assessment Standards

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
The student will:	*Assessment of student assessment will be based on:*	
• compare different channels of distribution and modes of transportation	• **Concept Test** consisting of questions related to the variety of channels and modes of transportation available in the marketplace. *Assessment Tool* *(to be developed)*	20
• examine different types of agents, wholesalers, and retailers used in the community	• **Presentation** consisting of types and names of local agents wholesalers and retailers; include examples of local franchises and the lines of merchandise or services they offer. *Assessment Tool* *(to be developed)*	20
• research and present the channels of distribution and modes of transportation used for a manufactured product	• **Presentation of Research:** Select a manufactured product. Research the product back to its raw material state. Include all channels of distribution and modes of transportation used to bring the product to the consumer. *Assessment Tool* *Channels of Distribution Assessment (M&M305-1)* *Standard* *Level 2 competencies in each section*	50

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
The student will:	*Assessment of student assessment will be based on:*	
• identify personal interests and opportunities as they relate to careers in distribution	• **Career Profile** that includes job description, education/qualification requirements, employment opportunities, advancement potential and salary range. *Assessment Tool* *(to be developed)*	10
• demonstrate effort to develop basic competencies.	• **Observation** of individual effort and interpersonal interaction during the instructional period, emphasizing: – managing learning – managing resources – being innovative – communication. *Assessment Tool* *Basic Competencies Reference Guide and any assessment tools noted above*	Integrated throughout

Concept	Specific Learner Expectations	Notes
Channels of Distribution Systems and Strategies	*The student should:* • define channels of distribution and provide examples • examine the three major distribution policies and provide examples of products that follow each policy: – extensive – selective – exclusive • evaluate the role of producers, processors, manufacturers, agents, brokers, wholesalers, retailers, consumers and identify examples of each • compare the most common types of channels and provide examples of products that go through each channel: – produce to consumer (direct) – one intermediary (retailer)	

Concept	Specific Learner Expectations	Notes
	The student should: – two intermediaries (wholesaler, retailer) – three intermediaries (agent, wholesaler, retailer) • examine the role of a broker, commission agent (sales, manufacturer).	
Wholesalers and Agents	• list the functions of a wholesaler • examine the importance of wholesalers to manufacturers, to retailers • investigate local wholesalers in your community • describe the different types of agent intermediaries and their role in the distribution process.	Real-estate agents, brokers, auctioneers.
Retailers	• analyze the common types of retail stores and give examples of each; include both service and merchandising businesses • examine the types of non-store retailers • investigate and give examples of franchises indicating the advantages and disadvantages of franchising • analyze future retailing opportunities and how it might effect traditional channels.	Convenience, specialty, discount, department, supermarket, superstore, co-operatives, wholesale warehouse club, catalogue showroom. Mail order, direct selling, telemarketing, automatic vending, network marketing.
Modes of Transportation	• explain the role transportation plays within the channels of distribution • compare the advantages and disadvantages of the various modes of transportation (cost, accessibility, reliability, in-transit time, flexibility): – rail – road – pipelines – air – water	

Concept	Specific Learner Expectations	Notes
	The student should: • illustrate the modes of transportation used for a variety of different products • explore developments in transportation methods.	For example, canned goods versus fresh flowers from Holland. For example, intermodal containerization with ship, rail, plane, truck.
Career Exploration	• investigate a variety of career opportunities in distribution • identify personal interests, talents and experiences as they relate to careers in distribution.	Define key terms related to career path/ladders, entry-level positions, mid-management, management positions.

MODULE M&M306: SETTING UP A RETAIL STORE

Level: Advanced

Theme: Marketing Systems and Strategies

Prerequisites: Marketing the Venture (E&I203; recommended)
Retail Operations (M&M204; recommended)

Module Parameters: None

The image and location of a retail business is an important factor to its success. In this module, students develop store images, examine potential locations and design store layouts. Students should be given hand-on experience by researching a location for an actual retailing opportunity and design a layout for this retail store. This module focuses on students owning a retail business and the necessary steps in setting up the establishment for success.

Curriculum and Assessment Standards

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
The student will:	*Assessment of student assessment will be based on:*	
• create an image for a retail business	• **Store Research Project - Part 1** Select a particular type of retail store and create an image for this retail store including a name, defining the target market, identification of quality and price and service/sales policies.	15
• analyze and justify a location and site	• **Store Research Project - Part 2** Identify a community and a site within the community for the retail store selected in Part 1.	15
• design an effective floor plan using the principles of store design and layout	• **Store Research Project - Part 3** Designing a store layout for the site selected in Part 2.	50
• recommend vendors and explain the selection of various vendors for the purchase of fixtures and equipment	• **Store Research Project - Part 4** Prepare a list of vendors to use when ordering furniture, fixtures and equipment for the particular store of choice.	10

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
The student will:	*Assessment of student assessment will be based on:*	
• prepare a maintenance schedule	• **Store Research Project - Part 5** Prepare a facilities housekeeping schedule for daily cleaning, general maintenance and redecorating. *Assessment Tool* *(to be developed)*	10
• demonstrate effort to develop basic competencies.	• **Observation** of individual effort and interpersonal interaction during the instructional period, emphasizing: – managing learning – managing resources – being innovative – teamwork and leadership – demonstrating responsibility. *Assessment Tool* *Basic Competencies Reference Guide and any assessment tools noted above*	Integrated throughout

Concept	Specific Learner Expectations	Notes
Creating a Store Image	*The student should:* • discuss examples of what creates a favourable image: – store name – targeting your market – quality/price of product and service – retail polices and services (credit, return policies, guarantees).	
Choosing a Location	• review marketing research strategies • describe the type of retail store he or she is interested in opening	See E&I203.

MODULE M&M306: SETTING UP A RETAIL STORE (continued)

Concept	Specific Learner Expectations	Notes
• Selecting a Community • Selecting a Site	*The student should:* • identify the kind of community (city/town/district) he or she is looking for • list store location objectives regarding target market, business environment and competition • identify and investigate a preliminary list of communities • compare communities selected, short list and rank • select the best community for the retail business • investigate various sites within the community • survey traffic patterns • explore options for location: – compare buying versus leasing – calculate how to best maximize sales – question the site based on store image – analyze large competition versus one-of-a-kind.	
Creating a Store/Floor Design	• analyze the: – space required – work flow patterns (employee, customer) – equipment/display/physical arrangement • discuss and illustrate how to incorporate: – enticements to customers (come, stay, buy, return) – efficiency/service – flexibility/convenience – safety (employees, customers) – security (merchandise, equipment) – maintenance (day-to-day, repair, remodel) • research the principles of floor design and layout (feature, impulse, staple goods, physical arrangement) • compare layout patterns among stores with similar product lines: – supermarket – department – small store – service operation	A background in Design Studies is helpful.

Concept	Specific Learner Expectations	Notes
	The student should: • identify elements that compete for space on the floor • describe/illustrate: – why the plan is functional – selling/non-selling areas – equipment/furniture – decor – image of business (inside/outside).	
Managing Facilities	• develop housekeeping schedules/workplans: – daily cleaning – general maintenance – redecorating (promotional and upkeep).	

MODULE M&M307: OFFICE SYSTEMS II

Level: **Advanced**

Theme: **Information Management Systems and Strategies**

Prerequisites: **Keyboarding II (INF202)**
Word Processing II (INF204)

Module Parameters: **Access to electronic office equipment**

Students continue to demonstrate effective office environment strategies and processes and manage processes and protocols related to written communications transmittals and business meetings.

Curriculum and Assessment Standards

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
The student will:	*Assessment of student assessment will be based on:*	
• evaluate and make recommendations for improving the quality of the office environment	• **Report** that will address: – change processes – job/role descriptions – work plan – training.	20
• demonstrate independent use of strategies, procedures, and electronic office equipment within office environments	• **Practical Lab Experience** in a simulated or actual office. Train others on a minimum of three different electronic office equipment. Show evidence of efficient use of electronic communications technologies and training of others.	40
• develop procedures for managing written communications transmittals	• **Office Manual** for written communication transmittals including: – planning and organizing strategies and procedures for incoming and outgoing mail – making decision regarding the appropriate postal or private services to use for a minimum of 10 different documents.	20
• demonstrate ability to plan and run a business meeting	• **Business Meeting** consisting of: – plan a business meeting – prepare for the meeting – use effective and efficient strategies during the meeting – complete follow-up tasks.	20

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
The student will: • demonstrate effort to develop basic competencies.	*Assessment of student assessment will be based on:* • **Observation** of individual effort and interpersonal interaction during the instructional period, emphasizing: – managing learning – managing resources – acting ethically – communication – demonstrating responsibility. *Assessment Tool* *Basic Competencies Reference Guide and any assessment tools noted above*	Integrated throughout

Concept	Specific Learner Expectations	Notes
Office Environment	*The student should:* • examine the change process within an office as electronic technologies alter the office environment • analyze the changing role of the office worker at the different levels (entry-level, supervisory, top-level management) • examine various job descriptions: – responsibilities (direct, indirect) – setting priorities – reporting structure – opportunities for initiative • illustrate the flow of work for one or more office functions • identify strategies to develop skill and train others on a variety of electronic office equipment	Select from offices of various sizes (e.g., home business, large corporation). Various sectors of the economy (e.g., oil, service industry, legal, real estate, insurance, auto dealership, health services). Telephone, photocopiers, calculators, electronic mail, facsimiles, dictaphones.

Concept	Specific Learner Expectations	Notes
	The student should: • compare office manuals for common policies and procedures • propose strategies by which an office could improve the commitment to quality management • implement strategies that increase personal productivity: – time and work management – setting priorities – resource management.	
Procedures • Managing Written Communications	• research strategies and procedures for small and large businesses regarding: – processing incoming mail – preparing outgoing mail • examine postal services available for transmitting documents: – various classes of mail – special services – other carriers available (private couriers and messenger services) • investigate the effect of electronic technology and communicating terminals on transmission of written documents.	For example, registered, special delivery, etc.
• Managing Meeting Arrangements	• identify procedures to use when planning a meeting – formal and informal • describe strategies to use to prepare for the meeting • describe how meetings run effectively and efficiently • describe the procedures to follow after the meeting.	

Concept	Specific Learner Expectations	Notes
Professionalism	*The student should:* • demonstrate proper personal grooming and dress appropriate to the office environment • follow ethics and laws regarding the use of electronic office equipment.	For example, copyright laws.

MODULE M&M308: COMMUNICATION STRATEGIES III: TECHNICAL WRITING

Level: **Advanced**

Theme: **Information Management Systems and Strategies**

Prerequisite: **Communications Strategies II (M&M206)**

Module Parameters: **None**

This module continues to improve students' basic oral and written communications strategies that are necessary for efficient, effective management of information. The focus is on technical writing strategies and composing at the computer when preparing formal business reports and proposals.

Curriculum and Assessment Standards

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
The student will:	*Assessment of student assessment will be based on:*	
• critique formal technical reports	• **Reading and Critiquing** a minimum of two formal technical reports for organization, clarity, completeness and use of proper sentence structure, grammar, spelling and punctuation. Suggest ways the report could be improved. *Assessment Tool* *(to be developed)*	20
• prepare a formal technical report that is clear, concise and meets the needs of the report user	• **Writing a Formal Technical Report** in a designated topic. Show evidence that the writing process was followed in its preparation: prewriting, writing, revising and proofreading. *Assessment Tool* *(to be developed)*	60
• deliver an oral, formal technical report supported by visual aids	• An **Oral Presentation**: Minimum of a 10-minute presentation of a formal technical report. Show evidence of effective oral communication strategies including use of non-verbal skills and visual aids. *Assessment Tool* *(to be developed)*	20

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
The student will: • demonstrate effort to develop basic competencies.	*Assessment of student assessment will be based on:* • **Observation** of individual effort and interpersonal interaction during the instructional period, emphasizing: – managing learning – managing resources – acting ethically – communication – demonstrating responsibility. *Assessment Tool* *Basic Competencies Reference Guide and any assessment tools noted above*	Integrated throughout

Concept	Specific Learner Expectations	Notes
Planning to Write Technical Reports	*The student should:* • identify examples of technical writing: – instruction manuals – research reports • describe characteristics of effective technical writing: – directed to topic/need – accurate (terminology, procedures, data) – current, clear, concise and complete • examine the parts of a formal technical report: – the cover – title page – table of contents – list of illustrations – synopsis (executive summary) – body of the text (discussion, conclusions, recommendations, footnotes) – appendix – bibliography or reference list – letter of transmittal • identify and demonstrate competencies needed for effective technical writing: – concentration – precision – precision – summarization skills	Examples of technical writing can be found in every CTS strand.

Concept	Specific Learner Expectations	Notes
	The student should: • read and evaluate a variety of technical reports • compare technical writing with other writing; e.g., creative, historigraphical, journalistic.	
Writing Effective Technical Reports	• research and follow *prewriting strategies* when preparing formal technical reports: – determine the purpose – prepare an outline – conduct the research – develop a notetaking system – prepare an outline putting all sections together • *compose* the first draft of the formal document using word-processing programs, templates and effective strategies for formal reports such as: – write one section at a time (executive summary being the last section to write) – use headings and side headings for ease of reading • use *revising* strategies such as: – check draft against outline – insure purpose has been achieved – check report is clear, concise and complete – check facts for accuracy • use *proofreading* strategies: – proofread for facts, dates, names, figures and other statistical information – proofread for sentence structure, grammar, spelling, punctuation and format.	
Oral Communications	• research and critique presentation strategies • identify types of visual aids one can use in a presentation • rehearse making an oral presentation of a formal technical report using visual aids and effective presentation strategies.	Charts, graphs, diagrams, pictures, outlines.

MODULE M&M309: **RECORDS MANAGEMENT II**

Level: **Advanced**

Theme: **Information Management Systems and Strategies**

Prerequisite: **Records Management I (M&M208)**

Module Parameters: **Access to an automated records system**

This module focuses on the advantages of an automated records system. Students who do not have database skills will require time to develop the skills to enter, edit, sort, search, select, format and print records. Numeric, subject and geographic coding are emphasized.

Curriculum and Assessment Standards

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
The student will:	*Assessment of student assessment will be based on:*	
• examine basic electronic records management concepts	• **Concept Test** consisting of questions related to: – basic electronic records management systems – subject, numeric and geographical record systems. *Assessment Tools* *(to be developed)*	20
• demonstrate ability to plan, create and use two of the following electronic records management systems: – numeric – subject – geographic	• **Electronic Records Management Project** consisting of two system (numeric, subject or geographic): – planning and organizing the system including justifying the plan – creating the records management systems – using the system by storing, retrieving, editing or manipulating records – preparing a report from each system. *Assessment Tool* *(to be developed)*	80
• demonstrate effort to develop basic competencies.	• **Observation** of individual effort and interpersonal interaction during the instructional period, emphasizing: – managing learning – managing resources – acting ethically – communication – demonstrating responsibility. *Assessment Tool* *Basic Competencies Reference Guide and any assessment tools noted above*	Integrated throughout

Concept	Specific Learner Expectations	Notes
Planning and Organizing Electronic Records	*The student should:* • define and give examples of automated records systems • relate the advantages of the automated records systems over manual systems • examine safety and security procedures of automated records • describe the process known as micrographics • examine the types of microfilm and their uses – roll film – microfiche – microfilm jacket – aperture cards • identify and describe electronic equipment and supplies necessary to create and maintain an efficient electronic records management system • differentiate between ROM and RAM when creating an electronic records management system.	See M&M208.
Creating a Subject Records Management System	• identify records that are or should be managed by subject • explain the advantages and disadvantages of subject storage • describe the standard arrangements for subject storage: – straight dictionary arrangement – encyclopedic arrangement • create a subject records management system • practise using the rules for subject filing by indexing, coding and storing a variety of records.	Working knowledge of database software package may require additional time if the student's software skills are not efficient (see Database I, II and III for special skill learning for database software). Students can prepare a manual for reference—coding rules.
Creating a Numeric Records Management System	• identify records that are or should be managed by number • explain the advantages and disadvantages of numeric storage	

Concept	Specific Learner Expectations	Notes
	The student should: • describe numeric storage methods: – consecutive numbering methods – non-consecutive numbering or terminal digit methods • explain the differences between consecutive and non-consecutive numeric record storage • describe how records can be stored chronologically • create a numeric records management system • practise using the rules for numeric filing by indexing, coding and storing a variety of records.	
Creating a Geographic Records Management System	• identify records that are or should be managed by geographic location • explain the advantages and disadvantages of geographic storage • explain the differences and similarities between geographical and alphabetic methods • create a geographic records management system • practise using the rules for geographic filing by indexing, code and store a variety of records.	
Storing and Monitoring Records Management Systems	For each records management system created (subject, numeric, and geographical): • store new data or records • retrieve data or records • sort and/or query records • create a report • manipulate and edit records • analyze strategies to prevent records from being mismanaged.	

MANAGEMENT AND MARKETING

ASSESSMENT TOOLS

(DRAFT)

BASIC COMPETENCIES REFERENCE GUIDE

The following basic competencies (KSA) are integrated throughout the CTS program. A student's performance and growth should be assessed through observations involving the student, the teacher, peers and others. As the student progresses through the levels, he or she builds on competencies gained in earlier levels.

	Basic Competency	Stage 1	Stage 2	Stage 3
Personal Management	Managing Learning	*The student will:* ☐ be able to identify/locate appropriate reference/ information sources ☐ identify and demonstrate a variety of learning skills and tools; e.g., learning styles/ preferences and strategies such as notemaking, concept mapping, etc.	*The student will:* ☐ apply a variety of learning styles/preferences to enhance ability to acquire new information recall and apply knowledge	*The student will:* ☐ draw and defend conclusions from available information ☐ extract rules or principles ☐ apply rules and principles to new situations
	Being Innovative	☐ recognize opportunities and problems ☐ specify goals and constraints ☐ generate alternatives ☐ consider risks ☐ evaluate and select best alternative	☐ think critically and act logically to evaluate situations, solve problems and make decisions	☐ combine ideas or information in new ways ☐ make connections between seemingly unrelated ideas ☐ prepare, validate and implement plans that reveal new possibilities
	Ethics	☐ identify appropriate ethical behaviour	☐ demonstrate appropriate ethical behaviour	☐ encourage and support others to demonstrate ethical behaviour
	Managing Resources	☐ allocate time effectively by selecting relevant, goal-related activities, ranking them in order of importance, allocating time, and preparing and following schedules.	☐ allocate materials and use facilities effectively by acquiring, storing, and distributing materials, supplies, parts, equipment, space, or final products in order to make best use of them.	☐ allocate human and other resources effectively by assessing knowledge and skills, distributing work and materials, evaluating performance and providing feedback.
Social Interactions	Communication	☐ prepare and effectively present accurate, concise written, visual and oral reports	☐ communicate thoughts, feelings, and ideas to justify or challenge a position by encouraging, persuading, convincing or otherwise motivating individuals or groups	☐ negotiate effectively by working towards an agreement that may involve exchanging specific resources or resolving divergent interests
	Teamwork, Leadership and Service	☐ participate as an effective member of a team by working cooperatively with others and contributing ideas, suggestions and effort ☐ recognize and respect peoples' diversity and individual differences	☐ serve clients and customers effectively by listening carefully to understand their needs and by providing as much assistance as possible to satisfy their expectations	☐ lead when appropriate, mobilizing the group for high performance
	Demonstrating Responsibility (Safety and Accountability)	☐ demonstrate high standards in attendance and punctuality ☐ be trustworthy and honest in dealing with others ☐ follow safe procedures consistently and recognize and eliminate potential hazards.	☐ understand and evaluate the impact on self and the organization for breaking with organizational or societal values and regulations.	☐ work hard to excel at setting and meeting goals, doing tasks, setting high standards and paying attention to important details.

Retail Sales Clerk Assessment

M&M102-1

Directions: Use the following rating scale to describe the student's level of competency when performing the tasks of a retail sales clerk.

0 - Not yet completed the task, major errors and/or deficiencies are evident.
1 - Completed task as directed, demonstrating rudimentary skills/completeness by following a guided course of action. Quality and productivity meet standard, but are inconsistent.
2 - Met task objectives with limited assistance in planning, solving problems and selecting and using materials and processes. Only minor errors and/or deficiencies are evident. Quality and productivity meet standards, but occasionally are inconsistent.
3 - Met task objectives in a self-directed way, selecting and using tools, materials and processes efficiently and effectively. No errors or deficiencies are noted. Quality and productivity consistently meet the standard.
4 - Met task objectives in a self-directed way, selecting and implementing the most appropriate course of action. Problems were solved in effective and creative ways. Quality, particularly details and finishes, and productivity exceed standards.

Student Name _____

Assessed by _____

Standard: Level 3 competency in each section in the last quarter of learning period

CRITERIA	RATING SCALE
Showing up for work	
☐ shows up for scheduled work shifts	☐ ☐ ☐ ☐ ☐
☐ arrives early in order to organize self and store	0 1 2 3 4
Quality customer service	
☐ knowledge of products in store	
☐ completes opening and closing procedures	☐ ☐ ☐ ☐ ☐
☐ greets customers in an appropriate manner	0 1 2 3 4
☐ is friendly and helpful during the sale	
☐ handles customer complaints	
☐ takes leave of customers in an appropriate manner	
Non-selling duties	
☐ follows store policy and procedures	
☐ maintains well-stocked shelves	☐ ☐ ☐ ☐ ☐
☐ contributes to the general upkeep and maintenance of the store	0 1 2 3 4
☐ assists in visual merchandising (stock on shelves, in-store displays, window displays)	
☐ assists in the preparation of promotional campaigns (creating advertisements, posters, etc.)	
Collaborative Worker	
☐ gets along with co-workers	
☐ helps co-workers when necessary to help balance workload	☐ ☐ ☐ ☐ ☐
☐ contributes to problem solving and decision making	0 1 2 3 4
Personal Characteristics	
☐ personal appearance for work situation	
☐ reliable and dependable	☐ ☐ ☐ ☐ ☐
☐ eager, enthusiastic and confident	0 1 2 3 4
☐ commitment to quality customer service	

Cashier Station Assessment

M&M102-2

Directions: Use the following rating scale to describe the student's level of competency when performing the tasks of a cashier.

0 - Not yet completed the task, major errors and/or deficiencies are evident.
1 - Completed task as directed, demonstrating rudimentary skills/completeness by following a guided course of action. Quality and productivity meet standard, but are inconsistent.
2 - Met task objectives with limited assistance in planning, solving problems and selecting and using materials and processes. Only minor errors and/or deficiencies are evident. Quality and productivity meet standards, but occasionally are inconsistent.
3 - Met task objectives in a self-directed way, selecting and using tools, materials and processes efficiently and effectively. No errors or deficiencies are noted. Quality and productivity consistently meet the standard.
4 - Met task objectives in a self-directed way, selecting and implementing the most appropriate course of action. Problems were solved in effective and creative ways. Quality, particularly details and finishes, and productivity exceed standards.

Student Name

_____

Assessed by

_____

Standard: Level 3 competency in each section in the last quarter of learning period

CRITERIA	RATING SCALE
Setting up the Cash Register ☐ counts and confirms the accuracy of the float ☐ ensures cash drawer is properly organized ☐ verifies total sales and customer count has been cleared to zero ☐ identifies appropriate clerk key to use and codes name into register if possible ☐ checks to ensure there is sufficient journal and receipt tape	☐ ☐ ☐ ☐ ☐ 0 1 2 3 4
Serving Customers ☐ greets the customer in an appropriate manner ☐ is friendly and helpful during the sale ☐ bags the merchandise properly ☐ takes leave of the customer in an appropriate manner	☐ ☐ ☐ ☐ ☐ 0 1 2 3 4
Ringing in the Sale ☐ enters a minimum of 3 sales accurately (minimum 5 items in each sale) ☐ handles money tendered properly ☐ makes change using least amount of coins and bills possible ☐ counts change back to customer from the amount of the sale to amount tendered	☐ ☐ ☐ ☐ ☐ 0 1 2 3 4
Cash Register Closing Procedures ☐ clears cash register of daily sales and customers ☐ generates a detailed audit tape of daily sales ☐ removes journal tape and rethreads tape in machine ☐ sets-up cash float and removes daily sales	☐ ☐ ☐ ☐ ☐ 0 1 2 3 4
Cash Reconciliation ☐ counts money and completes a cash out report ☐ completes a deposit slip for daily sales ☐ organizes cash for deposit	☐ ☐ ☐ ☐ ☐ 0 1 2 3 4

Print Advertisement Assessment

M&M202-1

Directions: Use the following rating scale to describe the student's level of competency when creating print advertisements.

0 - Not yet completed the project, major errors and/or deficiencies are evident.
1 - Completed project as directed, demonstrating rudimentary skills/completeness by following a guided course of action. Quality and productivity meet standard, but are inconsistent.
2 - Met project objectives with limited assistance in planning, solving problems and selecting and using materials and processes. Only minor errors and/or deficiencies are evident. Quality and productivity meet standards, but occasionally are inconsistent.
3 - Met project objectives in a self-directed way, selecting and using tools, materials and processes efficiently and effectively. No errors or deficiencies are noted. Quality and productivity consistently meet the standard.
4 - Met project objectives in a self-directed way, selecting and implementing the most appropriate course of action. Problems were solved in effective and creative ways. Quality, particularly details and finishes, and productivity exceed standards.

Student Name _____

Name of Product _____

Assessed by _____

Standard: Minimum of 2 in each section

CRITERIA	RATING SCALE
Creativity and neatness ☐ all parts of the ad are attractive ☐ ad has a clean, uncluttered look ☐ idea is original, unique and clever	☐ ☐ ☐ ☐ ☐ **0 1 2 3 4**
Layout and use ☐ typefaces (fonts) selected are appropriate for the product or store ☐ white space used properly to enhance the overall appearance of the advertisement ☐ ad has a focal point (a place for the eye to begin) ☐ ad flows (positioning each element in a logical place, moving the reader's eye from one element to the other) ☐ all parts of the advertisement tie together and relate to the objective of the advertisement	☐ ☐ ☐ ☐ ☐ **0 1 2 3 4**
Parts of the Advertisement ☐ attention-getting *headline* ☐ dominant *illustration* that enables reader to tell at a glance what ad is about ☐ *copy* relates product features and turns them into customer benefits ☐ recognizable *logo* is present	☐ ☐ ☐ ☐ ☐ **0 1 2 3 4**
Selling Power ☐ overall impact of ad induces the reader into action ☐ other information pertinent to the reader is given (e.g., store hours, address, phone number) ☐ action words are used to bring the customer into the store (e.g., limited offer/quantities)	☐ ☐ ☐ ☐ ☐ **0 1 2 3 4**
Oral Presentation ☐ explained how the objective was achieved and the section of the newspaper the ad would best be placed ☐ described how the AIDA concept was used in developing the advertisement	☐ ☐ ☐ ☐ ☐ **0 1 2 3 4**

Radio Commercial Assessment

M&M202-2

Directions: Use the following rating scale to describe the student's level of competency when creating radio commercials.

0 - Not yet completed the project, major errors and/or deficiencies are evident.
1 - Completed project as directed, demonstrating rudimentary skills/completeness by following a guided course of action. Quality and productivity meet standard, but are inconsistent.
2 - Met project objectives with limited assistance in planning, solving problems and selecting and using materials and processes. Only minor errors and/or deficiencies are evident. Quality and productivity meet standards, but occasionally are inconsistent.
3 - Met project objectives in a self-directed way, selecting and using tools, materials and processes efficiently and effectively. No errors or deficiencies are noted. Quality and productivity consistently meet the standard.
4 - Met project objectives in a self-directed way, selecting and implementing the most appropriate course of action. Problems were solved in effective and creative ways. Quality, particularly details and finishes, and productivity exceed standards.

Student Name _____

Name of Product _____

Assessed by _____

Standard: Minimum of 2 in each section

CRITERIA	RATING SCALE
Written Script ☐ organized format including dialogue, sound effects and special instructions noted ☐ typed attractively	☐ ☐ ☐ ☐ ☐ 0 1 2 3 4
Content of Commercial ☐ originality–creative, fresh, clever ☐ impact–the ad hits reader as being believable ☐ attracts attention by a strong opening ☐ builds interest by focusing on a single big idea (make every word count) ☐ arouses desire by promoting customer benefits (emotional involvement, repeat major points) ☐ induces action by creating an urgency to buy now and/or gives address, phone number, hours of operation	☐ ☐ ☐ ☐ ☐ 0 1 2 3 4
Technical Excellence ☐ commercial does not exceed 15-, 30- or 60-second assigned air time ☐ audio is clear including voices, music and special effects ☐ smoothness or continutity exists throughout ☐ customer can easily identify the product being advertised	☐ ☐ ☐ ☐ ☐ 0 1 2 3 4
Oral Presentation ☐ explained objective, target audience and buying motives ☐ justified time slot and station selected ☐ explained type of commercial (straight announcement, testimonial, jiggle, etc.) ☐ described how the AIDA concept was used in the production of commercial	☐ ☐ ☐ ☐ ☐ 0 1 2 3 4

Television Commercial Assessment

M&M202-3

Directions: Use the following rating scale to describe the student's level of competency when creating television commercials.

0 - Not yet completed the project, major errors and/or deficiencies are evident.
1 - Completed project as directed, demonstrating rudimentary skills/completeness by following a guided course of action. Quality and productivity meet standard, but are inconsistent.
2 - Met project objectives with limited assistance in planning, solving problems and selecting and using materials and processes. Only minor errors and/or deficiencies are evident. Quality and productivity meet standards, but occasionally are inconsistent.
3 - Met project objectives in a self-directed way, selecting and using tools, materials and processes efficiently and effectively. No errors or deficiencies are noted. Quality and productivity consistently meet the standard.
4 - Met project objectives in a self-directed way, selecting and implementing the most appropriate course of action. Problems were solved in effective and creative ways. Quality, particularly details and finishes, and productivity exceed standards.

Student Name _____

Name of Product _____

Assessed by _____

Standard: Minimum of 2 in each section

CRITERIA	RATING SCALE
Storyboard ☐ illustration of each shot with dialogue (illustration should convey what the shots are about) ☐ type and length of shot ☐ special instructions or effects when producing the shot	☐ ☐ ☐ ☐ ☐ 0 1 2 3 4
Content of Commercial ☐ originality–creative, fresh, clever ☐ impact–the ad hits viewer as being believable ☐ attracts attention by a strong opening ☐ builds interest by focusing on a single big idea (make every shot count) ☐ arouses desire by promoting customer benefits (emotional involvement, repeat major points) ☐ induces action by creating an urgency to buy now and/or gives address, phone number, hours of operation	☐ ☐ ☐ ☐ ☐ 0 1 2 3 4
Technical Excellence ☐ commercial does not exceed the 15-,30- or 60-second assigned air time ☐ visual and audio are clear ☐ editing is evident by creating an illusion of reality by cutting out the dead parts and getting into interesting action shots ☐ smoothness or continuity exists throughout ☐ customer can easily identify the product being advertised	☐ ☐ ☐ ☐ ☐ 0 1 2 3 4
Oral Presentation ☐ explained objective, target audience and buying motives ☐ justified time slot ☐ described how the AIDA concept was used in the production of the commercial	☐ ☐ ☐ ☐ ☐ 0 1 2 3 4

Types of Displays

- ☐ present and describe the following types of exterior displays
  - ☐ open
  - ☐ closed
  - ☐ partially closed
- ☐ present and describe the following types of interior displays
  - ☐ display racks
  - ☐ gondola display
  - ☐ table display
  - ☐ dump display
  - ☐ package display
  - ☐ platform display
  - ☐ architectural display
  - ☐ showcase display

Elements of Design in Displays

- ☐ demonstrate the atmosphere the following lines create in a display:
  - ☐ vertical
  - ☐ horizontal
  - ☐ curved
  - ☐ diagonal
- ☐ present examples of the following shapes and how they are used in displays
  - ☐ geometric
  - ☐ organic
  - ☐ positive
  - ☐ negative
- ☐ demonstrate knowledge and use of
  - ☐ colour wheel
  - ☐ different moods colours create
  - ☐ monochromatic colour schemes
  - ☐ analogous colour schemes
  - ☐ triadic colour schemes
  - ☐ complementary colour schemes
- ☐ demonstrate the atmosphere created through the use of 5 different textures
  - ☐ _____
  - ☐ _____
  - ☐ _____
  - ☐ _____
  - ☐ _____
- ☐ demonstrate knowledge and use of weight and size in a display
  - ☐ big vs. small
  - ☐ light vs. dark
  - ☐ oversized
  - ☐ foreground vs. background

Principles of Design in Displays

- ☐ demonstrate and explain when to use each the following display arrangements
  - ☐ interface
  - ☐ stair-step
  - ☐ pyramid
  - ☐ zig zag
  - ☐ repetition
  - ☐ radiation
- ☐ demonstrate and explain the use of the following design principles
  - ☐ harmony
  - ☐ contrast
  - ☐ rhythm
  - ☐ proportion
  - ☐ emphasis
  - ☐ unity
- ☐ demonstrate and explain the following types of balance
  - ☐ formal
  - ☐ informal
- ☐ demonstrate and explain the following types of lighting
  - ☐ direct
  - ☐ indirect

Rating Scale:

4 Met task objectives by independently selecting and implementing the most appropriate course of action. Problems were solved in effective and creative ways. Quality and productivity exceed standards.

3 Met task objectives independently, selecting and using materials/processes efficiently and effectively. No errors or deficiencies are noted. Quality and productivity consistently meet the standard.

2 Met task objectives with limited assistance in planning, solving problems and selecting and using materials/processes. Only minor errors/deficiencies are noted. Quality and productivity meet standards, but are occasionally inconsistent.

1 Completed task as directed, demonstrating rudimentary skills/completeness by following a guided course of action. Quality and productivity meet standard but are inconsistent.

0 Not yet completed task, major deficiencies and/or errors are evident.

N/A Not Applicable

STANDARD IS 2 IN EACH APPLICABLE TASK AREA

TASK CHECKLIST: PERSONAL DISPLAY PLANNER

M&M203-2

Prepare a visual merchandising plan for a calendar year for a particular business (minimum of 8 display ideas for the year). Ideas should include type of display, theme, merchandise, props, supplies needed and a sketch showing the merchandise and elements and principles of design being applied. This task will be used for future display ideas.

	Description of Display
☐	Month/season and event being promoted.
☐	Type of display, display theme or idea
☐	Merchandise to use
☐	Props and supplies necessary to complete display
☐	Colour/Colour scheme
☐	Display arrangement and principles used.

Rating Scale:

4 Met task objectives by independently selecting and implementing the most appropriate course of action. Problems were solved in effective and creative ways. Quality and productivity exceed standards.

3 Met task objectives independently, selecting and using materials/processes efficiently and effectively. No errors or deficiencies are noted. Quality and productivity consistently meet the standard.

2 Met task objectives with limited assistance in planning, solving problems and selecting and using materials/processes. Only minor errors/deficiencies are noted. Quality and productivity meet standards, but are occasionally inconsistent.

1 Completed task as directed, demonstrating rudimentary skills/completeness by following a guided course of action. Quality and productivity meet standard but are inconsistent.

0 Not yet completed task, major deficiencies and/or errors are evident.

N/A Not Applicable

STANDARD IS 2 IN EACH APPLICABLE TASK AREA

☐ Make a sketch of the display below

Visual Merchandising Assessment

M&M203-3

Directions: Use the following rating scale to describe the student's level of competency when creating visual merchandising window displays or in-store displays.

0 - Not yet completed the project, major errors and/or deficiencies are evident.
1 - Completed project as directed, demonstrating rudimentary skills/completeness by following a guided course of action. Quality and productivity meet standard, but are inconsistent.
2 - Met project objectives with limited assistance in planning, solving problems and in selecting and using materials and processes. Only minor errors and/or deficiencies are evident. Quality and productivity meet standards, but occasionally are inconsistent.
3 - Met project objectives in a self-directed way, selecting and using tools, materials and processes efficiently and effectively. No errors or deficiencies are noted. Quality and productivity consistently meet the standard
4 - Met project objectives in a self-directed way, selecting and implementing the most appropriate course of action. Problems were solved in effective and creative ways. Quality, particularly details and finishes, and productivity exceed standards.

Student Name _____

Name of Product _____

Assessed by _____

Standard: Minimum of 2 in each section

CRITERIA	RATING SCALE
Power to Attract Attention ☐ dominant feature attracts attention ☐ appropriate background used ☐ colour, lighting and props enhance theme and merchandise ☐ idea is original, unique and clever	☐ ☐ ☐ ☐ ☐ **0 1 2 3 4**
Arrangement ☐ proper amounts of merchandise used ☐ all elements are in proportion ☐ use of line and design principles leads eye to focal point ☐ specific arrangement of goods is evident ☐ display is in balance (formal or informal)	☐ ☐ ☐ ☐ ☐ **0 1 2 3 4**
Selling Power ☐ display creates interest and desire for the merchandise ☐ customer can find and concentrate on most important item(s) being sold ☐ related merchandise is presented ☐ all parts of the display create unity	☐ ☐ ☐ ☐ ☐ **0 1 2 3 4**
Technical Excellence and Cleanliness ☐ supplies are used effectively to display merchandise ☐ all props (forms and fixtures) are clean and in good repair ☐ background, ceiling, floor and glass is clean and neat ☐ show card is professional looking	☐ ☐ ☐ ☐ ☐ **0 1 2 3 4**

TASK CHECKLIST: VISUAL MERCHANDISING OBSERVATIONS

M&M203-4

General Appearance

- ☐ Name of store and location
- ☐ What event is being displayed? What is the theme?
- ☐ What merchandise is being displayed? (items for sale)
- ☐ What props have been used? Remember these enhance the theme and merchandise.
- ☐ What supplies were necessary to complete this display? (little things--fish wire, staple gun, etc.)

Elements and Principles of Design

- ☐ Does the display use formal or informal balance? Justify your observation.
- ☐ Describe how the display does or does not create unity.
- ☐ What colours and colour schemes have been used.
- ☐ Has a specific display arrangement or combination of arrangements been used. Explain.
- ☐ Does the display have lights? If yes, describe them.
- ☐ What are some of the other elements and principles of design used in the creation of this display?

Overall Impression

☐ ☐ ☐ ☐ ☐

0 1 2 3 4

Student Reflections regarding overall impression

Rating Scale:

4 Met task objectives by independently selecting and implementing the most appropriate course of action. Problems were solved in effective and creative ways. Quality and productivity exceed standards.

3 Met task objectives independently, selecting and using materials/processes efficiently and effectively. No errors or deficiencies are noted. Quality and productivity consistently meet the standard.

2 Met task objectives with limited assistance in planning, solving problems and selecting and using materials/processes. Only minor errors/deficiencies are noted. Quality and productivity meet standards, but are occasionally inconsistent.

1 Completed task as directed, demonstrating rudimentary skills/completeness by following a guided course of action. Quality and productivity meet standard but are inconsistent.

0 Not yet completed task, major deficiencies and/or errors are evident.

STANDARD IS 2 IN EACH APPLICABLE TASK AREA

Sales Presentation Assessment

M&M304-1

Directions: Use the following rating scale to describe the student's level of competency during a sales presentation presentation.

0 - Not yet completed the project, major errors and/or deficiencies are evident.
1 - Completed project as directed, demonstrating rudimentary skills/completeness by following a guided course of action. Quality and productivity meet standard, but are inconsistent.
2 - Met project objectives with limited assistance in planning, solving problems and in selecting and using materials and processes. Only minor errors and/or deficiencies are evident. Quality and productivity meet standards, but occasionally are inconsistent.
3 - Met project objectives in a self-directed way, selecting and using tools, materials and processes efficiently and effectively. No errors or deficiencies are noted. Quality and productivity consistently meet the standard
4 - Met project objectives in a self-directed way, selecting and implementing the most appropriate course of action. Problems were solved in effective and creative ways. Quality, particularly details and finishes, and productivity exceed standards.

Student Name _____

Name of Product _____

Assessed by _____

Standard: Minimum of 2 in each section

CRITERIA	RATING SCALE
APPROACH ☐ merchandise displayed and set-up for the situation (store, type of sale) ☐ use of body language (enthusiasm, confidence, sincerity) ☐ correct approach for the situation (greeting, service, merchandising) ☐ voice–confident, clear, not to fast, does not use slang	☐ ☐ ☐ ☐ ☐ 0 1 2 3 4
PRESENTATION ☐ identifies customer's needs and wants (asks questions, listens) ☐ demonstrates the product–presentation of product knowledge evolves around the type of customer and his/her needs and wants ☐ involves the customer in the presentation of product ☐ turns product features into customer benefits	☐ ☐ ☐ ☐ ☐ 0 1 2 3 4
HANDLING CUSTOMER OBJECTIONS/SUGGESTION SELLING ☐ listens and responds to customer objections ☐ objections resolved with tact and courtesy, customer interacts ☐ turns objection into selling points ☐ related merchandise is presented and suggested	☐ ☐ ☐ ☐ ☐ 0 1 2 3 4
CLOSING AND TAKING LEAVE OF THE CUSTOMER ☐ closing is initiated by the salesperson ☐ closing is smooth, natural and timely ☐ mechanics of closing are completed accurately (ringing in the sale and/or preparation of sales slip, merchandise wrapped) ☐ positive final statement offered to customer as he/she leaves.	☐ ☐ ☐ ☐ ☐ 0 1 2 3 4

Channel of Distribution Presentation Assessment

M&M305-1

Directions: Use the following rating scale to describe the student's level of competency when creating a channels of distribution presentation.

0 - Not yet completed the project, major errors and/or deficiencies are evident.
1 - Completed project as directed, demonstrating rudimentary skills/completeness by following a guided course of action. Quality and productivity meet standard, but are inconsistent.
2 - Met project objectives with limited assistance in planning, solving problems and selecting and using materials and processes. Only minor errors and/or deficiencies are evident. Quality and productivity meet standards, but occasionally are inconsistent.
3 - Met project objectives in a self-directed way, selecting and using tools, materials and processes efficiently and effectively. No errors or deficiencies are noted. Quality and productivity consistently meet the standard.
4 - Met project objectives in a self-directed way, selecting and implementing the most appropriate course of action. Problems were solved in effective and creative ways. Quality, particularly details and finishes, and productivity exceed standards.

Student Name _____

Name of Product _____

Assessed by _____

Standard: Minimum of 2 in each section

CRITERIA	RATING SCALE
Creativity and neatness ☐ easy to follow the product from its raw material stage to its consumable stage ☐ the presentation has a clean and uncluttered look ☐ presentation is original, unique and clever ☐ information presented in both written/vocal and visual format	☐ ☐ ☐ ☐ ☐ 0 1 2 3 4
Presentation of Producers ☐ top 3 raw materials presented (comes from the ground or above the ground, e.g. coal, wheat) ☐ three producers of the top 3 raw materials are listed if appropriate (e.g., flour mill) ☐ actual names of producers are identified	☐ ☐ ☐ ☐ ☐ 0 1 2 3 4
Presentation of Manufacturer and Middlemen ☐ manufacturer w/address ☐ wholesaler w/address (if applicable) ☐ additional agents or brokers identified (if applicable) ☐ selected retailer w/address	☐ ☐ ☐ ☐ ☐ 0 1 2 3 4
Presentation of the Modes of Transportation used ☐ identifies transportation methods used at the producer stage ☐ identifies transportation methods used by the manufacturer ☐ identifies transportation methods used between middlemen	☐ ☐ ☐ ☐ ☐ 0 1 2 3 4
Written Reflection/Oral Presentation ☐ describes how product was selected and choice of visual ☐ describes how research was completed (where you looked, went and who you talked to for specific product information and/or educated guesses made owing to lack of information) ☐ relates high points and frustrations encountered in completing the research for the presentation ☐ orally describes the channels of distribution for the product to another person	☐ ☐ ☐ ☐ ☐ 0 1 2 3 4

LINKAGES/TRANSITIONS

LINKAGES

Within CTS

In Management and Marketing, students have the opportunity to develop knowledge, skills and attitudes in business management, marketing and information management. Students are encouraged to link the competencies they have developed in these areas to other CTS strands. Linkages exist with other strands where products are produced and services are offered. Management and Marketing modules can be linked with these strands in order to successfully market these products and services to the ultimate consumer. The following chart outlines potential linkages.

Strand	Themes and/or Modules
Agriculture	Modules in the technology and applications theme that focus on production of consumable products and customer services.
Career Transitions	Project modules can be used to provide students with extended time for developing skills in a variety of management and marketing areas. Leadership module links with Managing for Quality.
Communication Technology	Promotion: Advertising links with all themes in Communication Technology.
Community Health	Providing caregiving as a service in business links with business and marketing system and strategies themes.
Construction Technologies	Modules in building and manufacturing themes that focus on production of consumable products and customer services.
Cosmetology Studies	Modules in Cosmetology that involve customer service have strong linkages to the retail modules including Customer Service, Retail Operations, Setting up a Retail Store.
Design Studies	Promotion: Visual Merchandising and Advertising have strong linkages to the design process. Elements and principles of design and layout are incorporated into both modules.
Electro Technologies	Modules in all themes that focus on production of consumable products and customer services. Repair/Maintenance and Computer Technology are examples of two modules that can offer services to customers.
Energy and Mines	Modules in the technology and applications theme that focus on production of consumable products and customer service.
Enterprise and Innovation ★	All modules in Enterprise and Innovation link directly to Management and Marketing modules in the Business and Marketing Systems and Strategies theme. See later in this Section H for expanded scope and sequence and suggested planning for integrating these two strands at the junior and senior high level.
Fabrication Studies	Modules in the Fabrication Processes and Production Systems and Processes themes that focus on production of consumable products and customer service.
Fashion Studies ★	Business/Merchandising modules in Fashion Studies have strong linkages to the modules in the Marketing Systems and Strategies theme.

★ Elaboration on these linkages is provided on the following pages.

Strand	Themes and/or Modules
Financial Management	Establishing an Accounting System for a Service or Merchandising Business and Advanced Financial Accounting Procedures and Financial Statements have strong linkages with the Marketing Systems and Strategies theme.
Foods	Modules in Foods that involve customer service have strong linkages with the retail modules including Customer Service, Retail Operations, Setting up a Retail Store.
Forestry	Harvesting and Forest Products and The Forest Marketplace modules link with the marketing systems and strategies themes.
Information Processing★	Most modules in the Information Processing strand have strong linkages with the Information Management Systems and Strategies theme.
Legal Studies	Laws relating to business have strong linkages to all Management and Marketing themes. Modules that have strong links include Labour Law, Consumer and Property Law, Laws Affecting Small Business.
Mechanics	Modules in all themes that focus on production of consumable products and customer services. Vehicle Care and Vehicle Maintenance are examples of two modules.
Tourism	Modules that involve customer service have strong linkages with the retail modules including Customer Service, Retail Operations, Setting up a Retail Store.

With Enterprise and Innovation

In Junior High

The following three modules may be offered at the junior high level:

- Management and Marketing Basics (Introductory Level)
- Quality Customer Service (Introductory Level)
- Communication Strategies I (Introductory Level)

These modules could also be combined with the following three Enterprise and Innovation modules:

- Challenge and Opportunity (Introductory)
- Planning the Venture (Introductory)
- Making It Happen (Intermediate).

When planning, it should be taken into consideration that the introductory Management and Marketing modules could act as a foundation to Enterprise and Innovation. Basic economic, management and marketing concepts are introduced in Management and Marketing Basics and basic consumer behaviour concepts in Quality Customer Service. As well, Quality Customer service offers practical hands-on skills for entry-level retailing. All of these concepts can enhance the success of Enterprise and Innovation. For schools wishing to offer a grade 8 and 9 program, these six modules could be selected. Other modules from other strands that could enhance the study of Management and Marketing and Enterprise and Innovation include:

- Career Transition Project Modules (Introductory Level)
- Introduction to Financial Management (Introductory Level)

In Senior High

All introductory, intermediate and advanced modules may be offered to senior high students. However, some students may have some of the

competencies identified through the courses or involvement in:

- junior high Enterprise and Innovation
- school/community associations (e.g., Peer Support, Student Government, Junior Achievement)
- a family business
- and enterprising initiative of their own (e.g., lawn maintenance, snow removal, baby-sitting, house sitting, pet care).

Following are a few examples of possible module groupings into sample courses. As the Business and Marketing Systems and Strategies theme in Management and Marketing offers 12 modules. There are an additional eight modules in Enterprise and Innovation, and it is possible to offer a 10-credit or 15-credit course through the integration of these two strands. See the Extended Scope and Sequence chart in this section showing both strands.

3–6 Credit Introductory Course

- Challenge and Opportunity
- Management and Marketing Basics
- Quality Customer Service

Another two Enterprise and Innovation modules focus on a venture:

- Planning the Venture
- Making It Happen.

Another two Marketing and Management modules could focus on entry-level retailing:

- Promotion: Visual Merchandising
- Retail Operations.

3–6 Credit Intermediate Course (choose 3-6 modules)

- Marketing the Venture
- Promotion: Visual Merchandising
- Promotion: Advertising
- Financing a Venture
- Retail Operations
- Making It Happen.

3–6 Credit Advanced Course with the Focus on Management

- Managing for Quality
- The Business Organization
- Managing the Venture
- Business in the Global Marketplace
- Expanding the Venture
- plus one other module from E&I or M&M.

3–6 Credit Advanced Course with the Focus on Marketing

- Marketing the Venture
- Promotion: Advertising
- Promotion: Sales Techniques
- Distribution of Goods and Service
- Setting Up a Retail Store

plus one other module from E&I or M&M.

With Fashion Studies

The Fashion Studies business/merchandising theme links directly with the retail merchandising modules in the marketing systems and strategies theme of Management and Marketing. Specific modules include:

Fashion	Fashion Merchandising
	Fashion Retailing
Marketing	Quality Customer Service
	Promotion: Advertising
	Promotion: Visual Merchandising
	Retail Operations
	Promotion: Sales Techniques
	Distribution of Goods and Services
	Setting up a Retail Store

Students interested in Fashion Merchandising should refer to the Fashion Studies linkages section for an extended scope and sequence.

With Information Processing

The information management systems and strategies theme of Management and Marketing links directly with Information Processing. Information management offers students the opportunity to learn basic knowledge, skills and attitudes necessary for success in today's office environment. Such learning links well with the learning of software and systems in the Information Processing strand. Note the prerequisites required to take many of these modules. Knowledge and skills of keyboarding, word processing and databases are necessary for success in the information management modules. Courses could be developed that integrate the two strands. For example, a 3- or 6-credit introductory communications course might include:

- Computer Operations
- Keyboarding I
- Word Processing
- Communication Strategies I
- Correspondence
- Information Highway I

A 3- or 6-credit intermediate course in Information Processing/Management might include:

- Keyboarding II
- Word Processing II
- Office Systems I
- Communication Strategies II
- Reports
- Records Management I.

A 3- or 6-credit advanced course in Information Processing/Management might include:

- Keyboarding III or IV
- Word Processing III or Word Processing Applications
- Office Systems II
- Communication Strategies II
- Data Base I
- Records Management II.

A 3- or 6-credit course in electronic communications might include:

- Computer Operations
- Keyboarding I
- Information Highway I
- Electronic Bulletin broads
- Local Area Networks
- Information Highway II.

This course would be useful for students interested in understanding the technical aspects of the information highway as well as using it.

With Other Secondary Programs

Management and Marketing has linkages with mathematics, language arts, economics and social studies. Depending on the venture selected, there may be linkages with numerous other courses.

TRANSITIONS

To Related Post-secondary Programs

Refer to the chart in this section for a summary of related programs offered at Alberta post-secondary institutions.

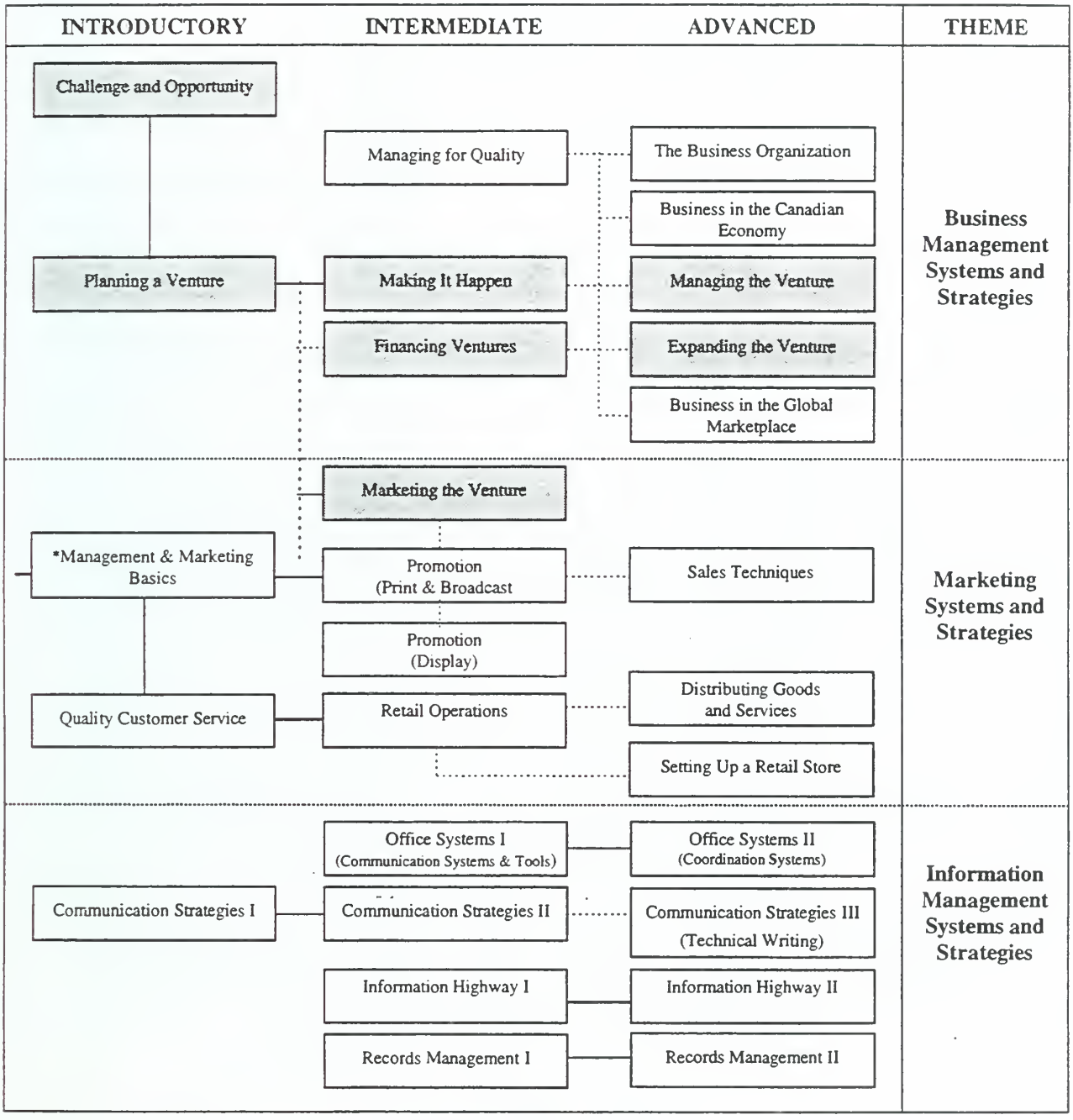
To the Workplace

The National Occupational Classification (NOC) and provincial Occupation Profiles (POP) chart in this section indicates occupations for hwich Management and Marketing provides a foundation. High school students could potentially move into:

- seven occupations requiring a high school education
- 26 occupations that require further education at a college or technical institution (possibly obtaining advanced standing or preferred entrance in the post-secondary program)
- occupations that require further education at the university level (possibly obtaining preferred entrance into a program).

EXTENDED SCOPE AND SEQUENCE

MANAGEMENT AND MARKETING and ENTERPRISE AND INNOVATION



Prerequisite

Recommended prerequisite or corequisite

Modules developed under the Enterprise and Innovation strand.

* This module is a prerequisite to all modules in the business management and marketing themes

MANAGEMENT & MARKETING: Linkages with Related Post-Secondary Programs

	Public Colleges												Private Colleges						Tech. Institute			Universities				Vocational Colleges			
	Alberta College of Art	Fairview College	Grande Prairie Regional College	Grant MacEwan Community College	Keyano College	Lakeland College	Lethbridge Community College	Medicine Hat College	Mount Royal College	Olds College	Red Deer College	Apprenticeship Trade	Alberta College	Augustana University College	Canadian Union College	Concordia College	King's College, The	North American Baptist College	NAIT	SAIT	Banff Centre	Athabasca University	University of Alberta	University of Calgary	University of Lethbridge	AVC - Calgary	AVC - Edmonton	AVC - Lac La Biche	AVC - Lesser Slave Lake
Agriculture Business/Management		D				D	VD			D													B		CBM				
Accounting (certificate & diploma programs)			CD	CD		D	CD	D	CD		CD		D(10m)		D				CD	CD		C	C	C	D	C	C	C	
Administration (including Arts, Community Leadership, Construction, Early Childhood, Employee Benefits Planning, Health Services, Hotel/Restaraunt, Human Resource Management & Organizational Studies, Insurance, Labour Relations, Local Government)			CD	CD			CD		CD										VC	CD	V	CB(3y) B(4y)	VC DM	C	CBM				
Banking																			C										
Business/Business Administration & Commerce (including degree programs in Accounting, Finance, Human Resources, Industrial & Legal Relations, International Business, Management & Marketing)			2t	2t	2t	1t	V	2t	2t		2t			1t	B	2t						B(3y)	BM PhD	PhD	BM				
Business Administration (certificate & diploma programs with various specializations)		CD	CD	CD	CD	D	CD	CD	CD	D	CD		D(10m)		D		D		D	D		C			C			C1t	C

MANAGEMENT & MARKETING: Linkages with Related Post-Secondary Programs

	Public Colleges												Private Colleges						Tech. Institute			Universities				Vocational Colleges			
	Alberta College of Art	Fairview College	Grande Prairie Regional College	Grant MacEwan Community College	Keyano College	Lakeland College	Lethbridge Community College	Medicine Hat College	Mount Royal College	Olds College	Red Deer College	Apprenticeship Trade	Alberta College	Augustana University College	Canadian Union College	Concordia College	King's College, The	North American Baptist College	NAIT	SAIT	Banff Centre	Athabasca University	University of Alberta	University of Calgary	University of Lethbridge	AVC - Calgary	AVC - Edmonton	AVC - Lac La Biche	AVC - Lesser Slave Lake
Management (including certificate & diploma programs in Agriculture, Business Enterprises & Self Governing Systems of Native and Metis People, Computing Science, Economics, Info Systems, Insurance, International, Labour, Management, Marketing & Tourism)			CD	CD		D		D2t	2t	D	C2t								VCD	CD	V		C	C	CD				C
Real Estate Appraisal & Assessment						D				D													VC	C					
Clerical (including certificate and diploma programs in Accounting, Bookkeeping, Business Education, Clerk/Clerk Typist, Clerical Refresher & Teller Training)		C	CD	C	C	C	C				V		D	C	D				VCD	C		C				C	C	C	C
Court Reporter																			D										
Medical/Clerical Transcription				C							D				D				C							C			
Office Adminstration/Records Management			CD			C	C	C		C	CD				D				CD	C									
Advertising/Media Sales/Public Relations				D			D		D											V									
Computer/MicroComputer Accounting			CD	C			C	D							V				VC									C	
Computer Marketing & Business Administration									D																				

Code: B Bachelor's Degree
M Master's Degree
PhD Doctoral Degree
C Certificate (1 year or less)
V Varies
1t One-year transfer
2t Two-year transfer
w weeks

This chart was adapted from *It's About Time: to start thinking about your future,* (1993-94, published by Alberta Advanced Education & Career Development Education).

LINKAGES TO THE WORKPLACE

All modules are designed to provide students with the knowledge, skills and attitudes that are required in the workplace, whether as a volunteer, an employer or an employee

Occupation Profile	NOC/POP	A	B	C	D
Accommodation Services Manager	NOC			✓	✓
Architecture and Science Managers	NOC			✓	✓
Banking, Credit and Other Investment Managers	NOC			✓	✓
Construction Managers	NOC				✓
Display Designer/Visual Merchandiser	POP	✓		✓	
Economic Development Officers and Marketing Researchers and Consultants	NOC				✓
Engineering Managers	NOC				✓
Facility Operation Managers	NOC			✓	✓
Financial Managers	NOC			✓	✓
Information Systems and Data Processing Managers	NOC				✓
Insurance, Real Estate and Financial Brokerage Managers	NOC			✓	✓
Maintenance Managers	NOC	✓		✓	✓
Managers in Health Care	NOC			✓	✓
Managers in Publishing, Motion Pictures, Broadcasting and Performing Arts	NOC			✓	✓
Managers in Social, Community and Correctional Services	NOC				✓
Marketing Manager	POP			✓	✓
Market Research Analyst	POP			✓	✓
Manufacturing Managers	NOC			✓	✓
Operations Manager	POP			✓	✓
Operations Research Analysts	POP			✓	✓
Other Administrative Services Managers	NOC			✓	✓
Other Business Services Managers	NOC			✓	✓
Other Services Managers	NOC	✓		✓	
Postal and Courier Services Managers	NOC			✓	✓
Professional Occupations in Business Services to Management	NOC			✓	✓
Property Management	POP	✓		✓	✓
Purchasing Managers and Buyers	BOTH			✓	✓
Restaurant and Food Service Managers	NOC			✓	✓
Sales, Marketing and Advertising Managers	NOC			✓	✓
Telecommunication Carriers Managers	NOC				✓
Transportation Managers	NOC				✓
Utilities Managers	NOC			✓	✓
Volunteer Managers	POP			✓	

A: High School Education
B: Apprenticeship
C: College or Vocational Education
D: University

CAREER & TECHNOLOGY STUDIES

MANAGEMENT & MARKETING

LEARNING RESOURCE GUIDE

INTERIM 1995
(SEPTEMBER 1995 - SEPTEMBER 1997)

Alberta
EDUCATION

MAY 1995

CURRICULUM STANDARDS BRANCH

Comments and suggestions are welcome and should be directed to:

Career and Technology Studies Unit
Alberta Education
Curriculum Standards Branch
11160 Jasper Avenue
Edmonton, AB
T5K 0L2
Telephone: 422-4872
Fax: 422-5129

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INTRODUCTION

CTS AND THE RESOURCE-BASED CLASSROOM

Career and Technology Studies (CTS) encourages teachers to establish a resource-based classroom, where a variety of appropriate, up-to-date print and non-print resources are available. Learning resources identified for CTS strands include print, software, interactive videos, manipulatives, student learning guides and tutorials.

The resource-based classroom approach accommodates a variety of instructional strategies and teaching styles, and supports individual or small group planning. It provides students with opportunities to interact with a wide range of information sources in a variety of learning situations. Students in CTS are encouraged to take an active role in managing their own learning. Ready access to a strong resource base enables students to learn to screen and use information appropriately, to solve problems, to meet specific classroom and learning needs, and to develop competency in reading, writing, speaking, listening and viewing.

PURPOSE AND ORGANIZATION OF THIS DOCUMENT

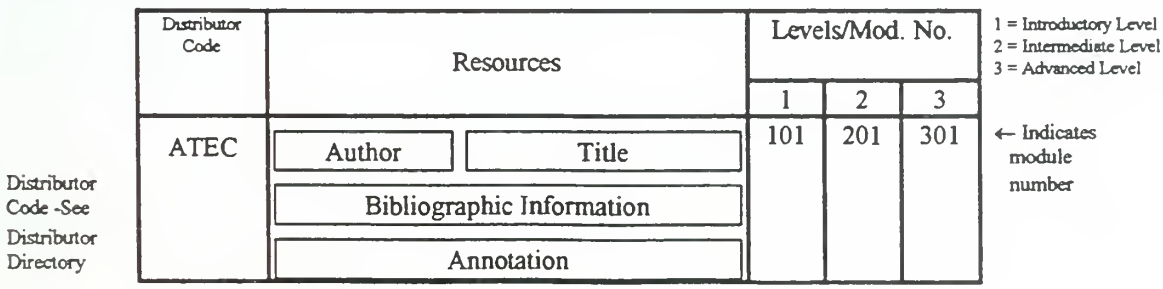
The purpose of this document is to help teachers identify a variety of resources to meet their needs and those of the students taking the new Management and Marketing curriculum. It is hoped that this practical guide to resources will help teachers develop a useful, accessible resource centre that will encourage students to become independent, creative thinkers.

This document is organized as follows:

- Authorized Resources
  - basic learning resources
  - support learning resources
  - teaching resources
- Other Resources
- Additional Sources.

Some resources in the guide have been authorized for use in some or all of the CTS strands, e.g., the 11 video Career and Technology Studies series produced by ACCESS Network. Full information is provided in the appropriate section of this resource guide.

Each resource in the guide provides bibliographic information, an annotation where appropriate, and a correlation to the Management and Marketing modules. The distributor code for each entry will facilitate ordering resources. It is recommended that teachers preview all resources before purchasing, or purchase one copy for their reference and additional copies as required.



HOW TO ORDER

Most authorized resources are available from the Learning Resource Distributing Centre (LRDC) at:

12360 - 142 Street
Edmonton, AB
T5L 4X9
Telephone: (403) 427-2767
Fax: (403) 422-9750

Purchase order numbers have been provided (where possible) for resources available through the LRDC. The section on Additional Sources lists a variety of other places to find information related to this strand. In addition, at the back of this document is a Distributor Directory, which contains the name and address of each publisher/distributor referred to in the resource list. Note that in some cases a resource may be published by one company but distributed through another.

The information contained is as complete and accurate as possible.

RESOURCE POLICY

For further information on resource policy and definitions, refer to the *Student Learning Resources Policy* and *Teaching Resources Policy* or contact:

Learning Resources Unit
Curriculum Standards Branch
Alberta Education
5th Floor, Devonian Building, East Tower
11160 Jasper Avenue
Edmonton, AB
T5K 0L2
Telephone: 422-4872
Fax: 422-5129

AUTHORIZED RESOURCES

BASIC LEARNING RESOURCES

The following basic learning resources have been authorized by Alberta Education for use in the Management and Marketing curriculum. These resources address the majority of the learner expectations in one or more modules and/or levels. A curriculum correlation appears in the right-hand column.

Distributor Code	Resources	Levels/Module No. 1	2	3
LRDC	*Electronic Office Procedures.* Barrington, et al. McGraw-Hill Ryerson, 1993 This text integrates the three existing types of offices (traditional, word processing and electronic). Human relations skills are interwoven with the technical aspects of the office.	103	205 206	307 308
LRDC	*Exploring Business: A Global Perspective.* Michael Liepner and Jane Magnan. Toronto, ON: McGraw-Hill Ryerson Ltd., 1994. This text explores our rapidly changing world of new technologies, careers, globalization and the increasing fragility of the environment. Throughout the text, students learn about the connection between these changes and the world of business.	101 102	201	301 302 303 304 305 306
LRDC	*Managing for Excellence.* Lori Cranson. Toronto, ON: McGraw-Hill Ryerson Ltd., 1988. This text addresses a broad range of marketing and management concepts including Canada's business environment, business structures, functions and theories, production, marketing, human resource and financial management.	101 102	201 202	301 302 303 304 305 306
LRDC	*Marketing: A Canadian Perspective.* (2nd edition.) Terry Taller. Toronto, ON: McGraw-Hill Ryerson Ltd., 1989. This text addresses the marketing mix -- product, price, promotion and place -- and includes careers	101 102	202	303 304 305 306
LRDC	*Marketing: A Global Perspective.* Margaret Stewart. Toronto, ON: Nelson Canada (John Wiley & Sons), 1991. This text is a comprehensive study of marketing techniques and activities and of the environment in which these take place both in Canada and globally.	101 102	201	303 304 305 306
LRDC	*Marketing Dynamics.* Sandy Levin. Toronto, ON: Copp Clark Pitman Ltd., 1990. This text addresses the four Ps of the marketing mix -- product, price, promotion and place -- and the two Cs of marketing -- the consumer and competition.	101 102	202 204	304 305 306

Basic Learning Resources (Cont'd.)

Distributor Code	Resources	Levels/Module No. 1	2	3
LRDC	*Marketing Today.* (2nd edition.) Harold J. Stoyes. Toronto, ON: McGraw-Hill Ryerson Ltd., 1994. This text intoduces students to current marketing concepts, careers, starting a business, advertising and display, selling and operations as they apply to retailing. Emphasis is on emerging concepts and practices in retail marketing and incorporates a thorough coverage of careers, demographics, technology, international retailing, entrepreneurship and marketing research.	101 102	202 203 204	303 304 305 306
LRDC	*Office Systems People, Procedures and Technology.* (Canadian edition.) R.T. Fruehling, et al. Toronto, ON: Irwin Publishing. 1993. This text helps students understand business information systems and how technology can be used to promote productivity in today's business office. Emphasis is on the interaction of people, equipment and procedures. Job functions common to most offices are presented.	103	205 206	307 308
LRDC	*World of Business, The.* (3rd edition.) Terry G. Murphy, et.al. Scarborough, ON: Nelson Canada, 1994. This text gives students an understanding of how the world of business operates. Includes the vital role of businesses in Canada and in the global economy. Computer technology is encouraged throughout.	101 102	201 202 204	301 302 303 304 305

SUPPORT LEARNING RESOURCES

The following support learning resources are authorized by Alberta Education to assist in addressing some of the learner expectations of a module or components of modules.

Distributor Code	Resources	Level/Module No. 1	2	3
ACC	*Career and Technology Studies: Key Concepts.* Edmonton, AB: ACCESS Network. Series of videos and utilization guides relevant to all CTS strands. Series consists of *Anatomy of a Plan, Creativity, Electronic Communication, The Ethics Jungle, Go Figure, Innovation, Making Ethical Decisions, Portfolios, Professionalism, Project Planning, Responsibility* and *Technical Writing.*	all	all	all
RKMC	*Channels of Distribution.* D.E. Videos. Cambridge, ON: RK Media Consultants, 1991. 29-minute video presents concepts related to the distribution of both goods and services. Includes topics on producers, wholesalers/agents, retailers, services and industrial users. Video produced in Florida--quality could be improved but concepts are clear and concise.			305
RKMC	*Creative Hard Line Display.* D.E. Videos. Cambridge, ON: RK Media Consultants, 1992 10 minute video that discusses the elements and principles of visual merchandising for hard line products such as hardware. Video produced in Florida--quality could be improved but concepts are clear and concise.		203	
LRDC	*Customer Service.* Enterprise Media Inc. Toronto, ON: Kinetic Inc., 1994 59-minute video that discusses the importance of customer service. Introduces the importance of customer service, senarios of bad, good and great service and concludes with the difference being you--the customer service person.	102		
RKMC	*Display Lighting.* D.E. Videos. Cambridge, ON: RK Media Consultants, 1992 20-minute video that discusses the use of lighting in visual merchandising. Video produced in Florida--quality could be improved but concepts are clear and concise.		203	
LRDC	*Effective Business Writing.* Scarborough, ON: Prentice-Hall Canada Inc., 1990. This text concentrates on the skill of writing in the business environment. It includes writing letters, memos, reports and proposals (both informal and formal) and the delivery of reports through oral presentations. A job package includes ideas for writing resumes, letters of applications and recommendations and tips for the job interview.	103	206	308

Support Learning Resources (Cont'd.)

Distributor Code	Resources	Level/Module No. 1	2	3
LRDC	*Electronic Office Procedures.* Barrington, et al. Toronto, ON: McGraw-Hill Ryerson. 1993. Applications Workbook. See Basic Learning Resources for annotation and module correlation.			
LRDC	*Essentials of Business Writing and Speaking: A Canadian Guide.* L. Sue Baugh, et al. Toronto, ON: Copp Clark Pitman 1989. This book is designed to help students find answers to specific business writing and speaking problems quickly and efficiently.	103	206	308
LRDC	*Excellence in Management.* Rick Conlow. Los Altos, CA: Crisp Publications, Inc., 1991. This action-oriented book covers the skills and techniques of managment that make a difference.	102	201	
LRDC	*Fundamentals of Copy & Layout.* (2nd edition.) Albert C. Book, and C. Dennis Schick. Lincolnwood, IL.: NTC Business Books, 1991. Designed for someone who is starting their advertising agency, this book can also be used as a review of basic procedures to print and broadcast advertising.		202	
LRDC	*Grab That Customer: Marketing and Customer Service.* Dianne Kaye. Vancouver, BC: Creative Curriculum Incorporated, 1989. This resource text contains 21 activity oriented lessons. Information and resource sheets may be duplicated. Topics are included into two sections: Marketing and Customer Service.	101 102	202 203	304 305 306
LRDC	*Handbook for Technical Writing,* James H. Shelton. Lincolnwood, IL: NTC Business Books, 1995. This handbook provides a framework for any technical or management writer. It includes styles of technical writing as well as the process, elements, forms and mechanics of technical writing. Provides exercises at the end of each section for skill development.		206	308
LRDC	*How To Use The Internet.* Mark Butler. Ziff-Davis Press, 1994. The text is an introductory guide to the Internet and provides instructions for using it.	104	207	

Support Learning Resources (Cont'd.)

Distributor Code	Resources	Level/Module No. 1	2	3
LRDC	*Impact: A Guide to Business Communication.* (3rd edition.) Margot Northey. Toronto, ON: Prentice-Hall Canada Inc., 1992. This text is a practical guide to writing and speaking on the job. Also includes a handy checklist of commonly misused words and phrases–all with Canadian spellings, idiom and grammar usage taken into account.	104	206	308
LRDC	*Making Economic Choices.* Dennis C. Doherty. Toronto, ON: Copp Clark Pitman Co., 1992. Text focuses on the impact of economic policies and decisions on people; less emphasis on abstract concepts.	101		302 303
LRDC	*Managing for Excellence.* Lori Cranson. Toronto: ON: McGraw-Hill Ryerson., 1988. Student Workbook. See Basic Learning Resources for annotation and module correlation.			
RKMC	*Markdown.* D.E. Videos. Cambridge, ON: RK Media Consultants, 1992. 11-minute video teaches the concepts of markdown in retail. Video produced in Florida--quality could be improved but concepts are clear and concise.		204	
LRDC	*Marketing: A Canadian Perspective.* (2nd edition.). Terry Taller. Toronto, ON: McGraw-Hill Ryerson Ltd., 1989. Student Workbook See Basic Learning Resources for annotation and module correlation.			
RKMC	*Markup.* D.E. Videos. Cambridge, ON: RK Media Consultants, 1992. 11-minute video teaches the concepts of markup based on retail and cost. Video produced in Florida--quality could be improved but concepts are clear and concise.		204	
RKMC	*Mass Merchandising.* D.E. Videos. Cambridge, ON: RK Media Consultants, 1992. 15-minute video defines and gives examples of mass merchandising and presents retail merchandising strategies. Video produced in Florida--quality could be improved but concepts are clear and concise.	101		
LRDC	*Media Messages.* Louise Steele. Vancouver, BC: Creative Curriculum Inc., 1992 This resource contains 20 activities that require students to create commercials or advertisments using the mediums of video, print, radio or mixed media.		202	

Support Learnaing Resources (Cont'd.)

Distributor Code	Resources	Level/Module No. 1	2	3
LRDC	*Office Systems People, Procedures and Technology.* (Canadian editon.) Applications Manual. R.T. Fruehling, et al. Irwin Publishing, 1993. See Basic Learning Resources for annotation and module correlation.	103	205 206	307 308
RKMC	*Professional Retail Selling.* D.E. Videos. Cambridge, ON: RK Media Consultants, 1992. 20- minute video that presents the sales process from the approach through closing. Video produced in Florida--quality could be improved but concepts are clear and concise.			304
LRDC	*Quick Filing Practice.*(3rd Canadian edition.) Stewart and Kahna. Toronto, ON: McGraw-Hill Ryerson Ltd. Practical and realistic exercises that reinforce filing rules in a way that reflects the business environment		208	309
LRDC	*Records Management.* Norman F. Kallaus and Mina M. Johnson. Cincinnati, OH: South-Western Publishing Co., 1992 This text is a basic introduction to the increasingly comprehensive field of records management. It emphasizes principles and practices of effective records management for manual and automated systems		208	309
LRDC	*Retailing.* (5th edition.) Gerald Pintel. Englewood Cliffs, NJ: Prentice-Hall, 1991. An introductory retailing text that includes buying, selling and merchandising processes. Addresses the philosophies and practices that have made the retail industry a significant force in the business world.	101 102	201 202 203 204	304 305 306
LRDC	*Selling: Helping Customers Buy.* (3rd edition.) Roger Ditzenberger and John Kidney. Cincinnati, OH: South-Western Publishing Co., 1992. This text addresses sales attitudes and techniques needed for job success including selling and non-selling activities.	102		305
LRDC	*Success Test, The.* CTV Program Sales, 1992. 48-minute video. A fun and educational game that will help Canadians survive the economic realities of the 1990s. The objective is to make viewers aware of their own and Canada's future prosperity.		201	301

Support Learning Resources (Cont'd.)

Distributor Code	Resources	Level/Module No. 1	2	3
RKMC	*Visual Merchandising.* D.E. Videos. Cambridge, ON: RK Media Consultants, 1992. 18:40-minute video that discusses visual merchandising ideas and principles. Includes definition of visual merchandising, AIDA concept, principle of balance, display arrangements and even vs. odd number of objects in a display. . Focus is on soft-line goods such as fashion. Video produced in Florida–quality could be improved but concepts are clear and concise.		203	
LRDC	*Visual Merchandising: Planning and Techniques.* Harland E. Samson and Wayne G. Little. Cincinnati, OH: South-western Publishing Co. 1985. This text/workbook covers all the basic concepts of visual merchandising from planning and creating to evaluating.		203	
LRDC	*Words That Sell.* Richard Bayan. Comtempory Books, Inc. 1984. This book lists more than 2500 high-powered words, phrases and slogans. It is a reference for anyone who needs access to the key words that make the difference in selling. It is arranged by category for handy reference.		202 203	304
LRDC	*World of Business, The.* (3rd edition.) Rick Pellizzer and Rob Smythe. Scarborough, ON: Nelson Canada, 1994. Computer Simulation. This resource has four different simulations and is designed for Grade 9 -12 depending on the simulation. Simulations include Summer Enterprise, Consumer Affairs, International Currency, and Finance Minister.		201	302 303
LRDC	*World of Business, The.* (3rd edition.) Terry G. Murphy, etal. Scarborough, ON: Nelson Canada, 1994. Student Workbook See Basic Learning Resources for annotation and module correlation.			

TEACHING RESOURCES

The following teaching resources are authorized by Alberta Education to assist teachers in the instructional process.

Distributor Code	Resources	Levels/Module No. 1	2	3
LRDC	*Effective Business Writing.* Jennifer MacLennan. Scarborough ON: Prentice-Hall Canada Inc., 1990. Instructor's Manual. See Support Learning Resources for annotation and module correlation.			
LRDC	*Electronic Office Procedures* Barrington, et al. Toronto, ON: McGraw-Hill Ryerson, 1993. Teacher's Manual. See Support Learning Resources for annotation and module correlation.			
LRDC	*Essentials of Business Writing and Speaking: A Canadian Guide.* Sue L. Baugh, et al. Toronto, ON: Copp Clark Pitman, 1989. Answer Key. See Support Learning Resources for annotation and module correlation.			
LRDC	*Exploring Business: A Global Perspective Teacher's Resource.* Michael Liepner and Jane Magnan. Toronto, ON: McGraw-Hill Ryerson Ltd., 1994. See Basic Learning Resources for annotation and module correlation. Includes CD-Rom Activity/Evaluation Disk for both Macintosh and DOS.			
LRDC	*Impact, A Guide to Business Communication.* (3rd edition.) Margot Northey. Toronto, ON: Prentice-Hall Canada Inc., 1992. Instructor's Manual. See Support Learning Resources for annotation and module correlation.			
LRDC	*Making Economic Choices.* Dennis C. Doherty. Toronto, ON: Copp Clark Pitman Co., 1992. Teacher's Manual. See Support Learning Resources for annotation and module correlation.			
LRDC	*Management Appreciation.* Helen Harding. Pitman Publishing, 1993. This text, as a teacher's resource, covers the basic functions, theories, structures of organizations as well as roles and responsiblilities of managers.		201	301
LRDC	*Managing for Excellence.* Lori Cranson. Toronto, ON: McGraw-Hill Ryerson Ltd., 1988. Teachers Manual. See Basic Learning Resources for annotation and module correlation.			

Teaching Resources (Cont'd.)

Distributor Code	Resources	Levels/Module No. 1	2	3
LRDC	*Marketing: A Canadian Perspective.* (2nd edition.) Terry Taller, Toronto, ON: McGraw-Hill Ryerson Ltd., 1989. Teachers Resource Book. See Basic Learning Resources for annotation and module correlation.			
LRDC	*Marketing: A Global Perspective.* Margaret Stewart.. Toronto, ON: Nelson Canada (John Wiley & Sons), 1991. Resource Manual See Basic Learning Resources for annotation and module correlation.			
LRDC	*Marketing Dynamics.* Sandy Levin. Toronto, ON: Copp Clark Pitman Ltd., 1990. Teacher's Manual. See Basic Learning Resources for annotation and module correlation.			
LRDC	*Marketing Today.* (2nd edition.). Harold J. Stoyes. Toronto, ON: McGraw-Hill Ryerson Ltd., 1994. Teacher's Resource. See Basic Learning Resources for annotation and module correlation.			
LRDC	*Office Systems People, Procedures and Technology,* (Canadian edition.). R.T. Fruehling, et al. Irwin Publishing, 1993. Teacher's Manual. See Basic Learning Resources for annotation and module correlation.			
LRDC	*Professional Selling in Canada: Strategies for Career Success.* Gerry B. McCready. Toronto, ON: Holt, Rinehart and Winston of Canada, Ltd., 1994. This advanced text gives an in-depth look into selling. It is organzied into four parts: Selling as a Profession, Planning and Preparation, the Selling Process and the Future in Selling.	101 102		304
LRDC	*Quick Filing Practice.* (3rd Canadian edition.) Stewart and Kahna. Toronto, ON: McGraw-Hill Ryerson Ltd. Teacher's Manual and Key. See Support Learning Resources for annotation and module correlation.			
LRDC	*Records Management.* Norman F. Kallaus and Mina M. Johnson. Cincinnati, OH: South-Western Publishing Co. 1992 Instructor's Manual. See Support Learning Resources for annotation and module correlation.			
LRDC	*Retailing.* (5th edition.) Gerald Pintel. Englewood Cliffs, NJ: Prentice-Hall, 1991. Teacher's Resource. See Support Learning Resources for annotation and module correlation.			

Teaching Resources (Cont'd.)

Distributor Code	Resources	Levels/Module No. 1	2	3
LRDC	*Selling: Helping Customers Buy.* (3rd edition.) Roger Ditzenberger and John Kidney. Cincinnati, OH: South-Western Publishing Co., 1992. Manual. See Support Learning Resources for annotation and module correlation.			
LRDC	*Visual Merchandising: Planning and Techniques.* Harland E. Samson and Wayne G. Little. Cincinnati, OH: South-western Publishing Co. 1985. Teachers Manual. See Support Learning Resources for annotation and module correlation.			
LRDC	*World of Business, The: A Canadian Profile.* (3rd edition.) Terry G. Murphy, et.al. Scarborough, ON: Nelson Canada, 1994. Teacher's Resource. See Basic Learning Resources for annotation and module correlation.			

MANA[illegible]MENT & MARKETING RESOURCES

THEME CODE:
A. Business Management Systems & Strategies
B. Marketing Systems & Strategies
C. Information Management Systems & Strategies

FORMAT CODE:
p - Print
v - Video
s - Software

STATUS CODE:
B - Basic *T - Teaching*
S - Support *O - Other*

LEVEL CODE:
1 - Introductory
2 - Intermediate
3 - Advanced

SCHOOL CODE
J - Junior High
S - Senior High

LEVEL								1	1	1	1	2	2	2	2	2	2	2	2	3	3	3	3	3	3	3	3	3
THEME								B	B	C	C	A	B	B	C	C	C	C	C	A	A	A	B	B	B	B	C	C
SPECIAL FACILITIES								101	102	103	104	201	202	203	204	205	206	207	208	301	302	303	304	305	306	307	308	309
	Format	*Status*	*Currently Authorized*	*T&U*	*Annotations*	*Curriculum Fit*	*Junior/Senior High*	Management & Marketing Basics	Quality Customer Service	Communication Strategies I	Information Highway I	Managing for Quality	Promotion: Advertising	Promotion: Visual Merchandising	Retail Operations	Office Systems I	Communication Strategies II	Information Highway II	Records Management I	The Business Organization	Business in the Canadian Economy	Business in the Global Marketplace	Promotion: Sales Techniques	Distributing Goods and Services	Setting Up a Retail Store	Office Systems II	Communication Strategies III Technical Writin	Records Management II
Channels of Distribution	*V*	*S*					S																X				
Creative Hard Line Display	*V*	*S*					j/s							X													
Customer Service	*V*	*S*					*J/S*		X																		
Display Lighting	*V*	*S*					J/S							X													
Effective Business Writing	*P*	*S*					S			X							X									X	
Effective Business Writing, Instructor's Manual	*P*	*T*					S			X							X									X	
Electronic Office Procedures	*P*	*B*					S			X						X	X								X	X	
Electronic Office Procedures Applications Workbook	*P*	*S*					S			X						X	X								X	X	
Electronic Office Procedures, Teacher's Manual	*P*	*T*					S			X						X	X								X	X	
Essentials of Business Writing and Speaking: A Canadian Guide	*P*	*S*					J/S			X							X									X	
Essentials of Business Writing and Speaking: A Canadian Guide, Answer Key	*P*	*T*					J/S			X							X									X	
Excellence in Management	*P*	*S*					S					X															
Exploring Business: A Global Perspective	*P*	*B*					S	X	X			X								X	X	X	X	X	X		

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THEME								B	B	C	C	A	B	B	C	C	C	C	C	A	A	A	B	B	B	B	C	C
SPECIAL FACILITIES								101	102	103	104	201	202	203	204	205	206	207	208	301	302	303	304	305	306	307	308	309
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Exploring Business: A Global Perspective Teacher's Resource	*P*	*T*					S	X	X			X								X	X	X	X	X	X			
Fundamentals of Copy and Layout	*P*	*S*					S						X																
Grab That Customer: Marketing & Customer Service.	*P*	*S*					J/S	X	X				X	X										X	X	X			
Handbook for Technical Writing	*P*	*S*					S										X										X	
How to Use the Internet	*P*	*S*					J/S				X							X											
Impact: A Guide to Business Communications	*P*	*S*					S			X							X										X	
Impact: A Guide to Business Communications, Instructors Manual	*P*	*T*					S			X							X										X	
Making Economic Choices	*P*	*S*					S	X													X	X						
Making Economic Choices, Teacher's Manual	*P*	*T*					S	X													X	X						
Management Appreciation	*P*	*T*					S					X								X								
Managing for Excellence	*P*	*B*					S	X	X			X	X							X	X	X	X	X	X			
Managing for Excellence, Student Workbook	*P*	*S*					S	X	X			X	X							X	X	X	X	X	X			
Managing for Excellence, Teacher's Manual	*P*	*T*					*S*	X	X			X	X							X	X	X	X	X	X			

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THEME								B	B	C	C	A	B	B	C	C	C	C	C	A	A	A	B	B	B	B	C	C
SPECIAL FACILITIES								101	102	103	104	201	202	203	204	205	206	207	208	301	302	303	304	305	306	307	308	309
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Markdown	*V*	*S*					S								X													
Marketing Dynamics	*P*	*B*					J/S	X	X				X		X								X	X	X			
Marketing Dynamics Teacher's Manual	*P*	*T*					J/S	X	X				X		X								X	X	X			
Marketing Today	*P*	*B*					J/S	X	X				X	X	X							X	X	X	X	X		
Marketing Today, Teacher's Resource	*P*	*T*					J/S	X	X				X	X	X							X	X	X	X	X		
Marketing: A Canadian Perspective	*P*	*B*					S	X	X				X									X	X	X	X			
Marketing: A Canadian Perspective, Student Workbook	*P*	*S*					S	X	X				X									X	X	X	X			
Marketing: A Canadian Perspective, Teachers Resource Book	*P*	*T*					S	X	X				X									X	X	X	X			
Marketing: A Global Perspective	*P*	*B*					S	X	X				X									X	X	X	X			
Marketing: A Global Perspective, Resource Manual	*P*	*T*					S	X	X				X									X	X	X	X			
Markup	*V*	*S*					S								X													
Mass Merchandising	*V*	*S*					J/S	X																				
Media Messages	*P*	*S*					J/S						X															

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THEME								B	B	C	C	A	B	B	C	C	C	C	C	A	A	A	B	B	B	B	C	C
SPECIAL FACILITIES								101	102	103	104	201	202	203	204	205	206	207	208	301	302	303	304	305	306	307	308	309
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Office Systems People, Procedures and Technology	*P*	*B*					S			X						X	X									X	X	
Office Systems: People, Procedures and Technology, Applications Manual	*P*	*S*					S			X						X	X									X	X	
Office Systems: People, Procedures and Technology, Teachers Manual	*P*	*T*					S			X						X	X									X	X	
Professional Retail Selling	*V*	*S*					S																X					
Professional Selling in Canada: Strategies for Career Success	*P*	*T*					S	X	X														X					
Quick Filing Practice	*P*	*S*					S												X									X
Quick Filing Practice, Teachers Manual	*P*	*T*					S												X									X
Records Management	*P*	*S*					S												X									X
Records Management, Instructor's Manual	*P*	*T*					S												X									X
Retailing, 5th Edition	*P*	*S*					S	X	X			X	X	X	X								X	X	X			
Retailing, Teacher's Resource, 5th Edition	*P*	*T*					S	X	X			X	X	X	X								X	X	X			

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J - Junior High
S - Senior High

LEVEL								1	1	1	1	2	2	2	2	2	2	2	2	3	3	3	3	3	3	3	3	3
THEME								B	B	C	C	A	B	B	C	C	C	C	C	A	A	A	B	B	B	B	C	C
SPECIAL FACILITIES								101	102	103	104	201	202	203	204	205	206	207	208	301	302	303	304	305	306	307	308	309
	Format	*Status*	*Currently Authorized*	*T&U*	*Annotations*	*Curriculum Fit*	*Junior/Senior High*	Management & Marketing Basics	Quality Customer Service	Communication Strategies I	Information Highway I	Managing for Quality	Promotion: Advertising	Promotion: Visual Merchandising	Retail Operations	Office Systems I	Communication Strategies II	Information Highway II	Records Management I	The Business Organization	Business in the Canadian Economy	Business in the Global Marketplace	Promotion: Sales Techniques	Distributing Goods and Services	Setting Up a Retail Store	Office Systems II	Communication Strategies III Technical Writin	Records Management II
Selling: Helping Customers Buy, 3rd Ed.	*P*	*S*					J/S		X														X					
Selling: Helping Customers Buy, Manual	*P*	*T*					J/S		X														X					
Success Test, The	*V*	*S*					S					X								X								
Visual Merchandising	*V*	*S*					J/S							X														
Visual Merchandising: Planning and Techniques	*P*	*S*					S							X														
Visual Merchandising: Planning and Techniques, Teachers Manual	*P*	*T*					S							X														
Words That Sell	*P*	*S*					J/S						X	X									X					
World of Business, The, 3rd Ed.	*P*	*B*					J/S	X	X			X	X		X					X	X	X	X	X				
World of Business, The, 3rd Ed., Computer Simulation	*S*	*S*					J/S					X									X	X						
World of Business, The, 3rd Ed., Student Workbook	*P*	*S*					J/S	X	X			X			X					X	X	X	X	X				
World of Business, The, 3rd Ed., Teacher's Resource	*P*	*T*					*J/S*	X	X			X	X		X					X	X	X	X	X				

OTHER RESOURCES

These titles are provided as a service only to assist local jurisdictions to identify resources that contain potentially useful ideas for teachers. Alberta Education has done a preliminary review of the resources. However, the responsibility to evaluate these resources prior to selection rests with the user, in accordance with any existing local policy.

Distributor Code	Other Resources
ACC	*Business Concepts - Business Ownership* (5 videos), *Inventory* (5 videos), *Retail Selling* (8 videos). Edmonton, AB: ACCESS Network, 1988. 5-minute programs presenting concepts within each of the topics. Presented using animation.
ACC	*Business of Management Video Series, The*. (27 videos.) Edmonton, AB: ACCESS Network, 1982. The theoretical and the practical are integrated in this introduction to the field of management. Explains in detail five classical managerial functions: planning, organizing, staffing, directing and controlling. Larger organizational considerations are discussed: change mangement, conflict management, organizational communications, stress management and productivity.
HBC	*Contemporary Marketing*. (4th edition.) Louis Boone and David L. Kurtz. Toronto, ON: Harcourt, Brace and Co. Canada. 1985. This resource contains a text and study guide that are used with the Magic Lantern Marketing Video Series. It was developed as a telecourse for Coast Community College in California.
MAG	*Marketing Video Series*. (25 videos.) Oakville, ON: Magic Lantern Communications Ltd., 1984, 1992. Each of these video case studies provides an introduction to a basic principle or central aspect of marketing. Students are given a look at marketing professionals working in a wide range of real marketing situations for various organizations and corporations. For the advanced student.

ADDITIONAL SOURCES

Available to Management and Marketing teachers, both locally and provincially, are many resources that can be used to enhance Career and Technology Studies courses. These resources can be accessed through the community, government agencies, resource centres and organizations. Some of these sources, e.g., government departments, undergo frequent name and/or telephone number changes. Please check your telephone directory or an appropriate government directory.

The following is a partial list of sources to consider.

TEACHER-LIBRARIANS

Planned and purposeful use of library resources helps students grow in their ability to gather, process and share information. Research activities require access to an adequate quantity and variety of appropriate, up-to-date print and non-print resources from the school library, other libraries, the community and additional sources. Some techniques to consider are:

- planning together
- establishing specific objectives
- integrating research skills into planning.

Cooperation between the teacher-librarian and the subject area teacher in the development of effectively planned resource-based research activities ensures that students are taught the research skills as well as the subject content.

Also see *Focus on Research: A Guide to Developing Student's Research Skills* referenced in the Alberta Education Resources section.

ALBERTA EDUCATION SOURCES

The following monographs are available for purchase from:

Learning Resource Distributing Centre
12360 142 Street
Edmonton, AB
T5L 4X9
Telephone: 427-2767
Fax: 422-9750

Please consult the "Support Documents" section or the "Legal, Service and Information Publications" section in the *Buyers Guide* for ordering information and costs.

Developmental Framework Documents

- *The Emerging Student: Relationships Among the Cognitive, Social and Physical Domains of Development*, 1991

  This document looks at the whole child, or student, as a productive learner, integrating all the domains of development: cognitive, social and physical. It emphasizes the need for providing balanced curriculum and instruction.

- *Students' Interactions Developmental Framework: The Social Sphere*, 1988

  This document focuses on the student as a social being. It looks at the student's affective or emotional growth and examines moral development. These three domains make up the social sphere.

- *Students' Physical Growth: Developmental Framework Physical Dimension*, 1988

  This document examines children's normal physical growth in three areas: perceptual, structural and motor development. In none of these areas is the child's growth in a single continuous curve throughout the first two decades of life. Physical growth is characterized by periods of rapid growth and periods of slower growth. Consequently, differences and changes in growth patterns may affect the timing of certain learning processes.

- *Students' Thinking: Developmental Framework Cognitive Domain*, 1987

  This document explores children's cognitive development from infancy to adolescence. The Piagetian stages of pre-operational, concrete operational and formal operational thinking are explained. Suggestions for improving the learning process are also presented.

Others

- *Focus on Research: A Guide to Developing Students' Research Skills*, 1990

  This document outlines a resource-based research model that helps students manage information efficiently and effectively, and in this process, to gain skills that are transferable to all school and work situations. This model provides a developmental approach to teaching students how to do research.

- *Teaching Thinking: Enhancing Learning,* 1990

  Principles and guidelines for cultivating thinking, ECS to Grade 12, have been developed in this resource. It offers a definition of thinking, describes nine basic principles on which the suggested practices are based, and discusses possible procedures for implementation in schools and classrooms.

OTHER GOVERNMENT SOURCES

ACCESS Network

ACCESS Network offers a variety of resource and services to teachers. For a nominal dubbing and tape fee, teachers may have ACCESS Network audio and video library tapes copied.

ACCESS Network publishes a listing of audio and video cassettes as well as a comprehensive programming schedule.

Of particular interest are the Career and Technology Studies videos that are available with teacher utilization guides. The guides outline key points in each video and suggest questions for discussion, classroom projects and other activities. Video topics are listed in the Support Learning Resources section of this Guide. The videos and accompanying support material can be obtained from:

ACCESS Network
3720 76 Avenue
Edmonton, AB
T5B 2N6
Telephone: 440-7777 (in Edmonton)
1-800-352-8293
(outside Edmonton)

Alberta Advanced Education and Career Development

Information Development and Marketing
9th Floor, City Centre Building
10155 102 Street
Edmonton, AB
T5J 4L5
Telephone: 422-1794
Fax: 422-5126

Career Information Catalogue Update, 1994
The Career Planner
Children Challenge Choice
Entrepreneur: A Big Word for Small Business
Rural Women as Business Entrepreneurs
Positive Works
Skills are your Passport.

Videos on career planning and entrepreneurial topics are available through the library of this department. Call 422-4752 for more information. The following videos are representative of the library's holdings:
The Entrepreneur
Get a Job
A Head for Business
The Seven Phases of a Job Interview.
Job Search the Product is You

The Winning Edge: Alberta Success Stories (66 minutes) is available through the LRDC. This resource comes complete with training package and video.

Alberta Economic Development and Tourism

Strategic Planning and Research
9th Floor, Sterling Place
9940 106 Street
Edmonton, AB
T5K 2P6
Telephone: 422-9494
Fax: 422-5922

Financing a Small Business
Marketing a Small Business
Starting a Small Business.
Operating a Small Manufacturing Business
Operating a Small Service Business
Selecting a Small Business Computer System
Bookkeeping for a Small Business
Alberta Intenational Trade Reveiw
Seizing the Opportunity: Alberta Business Overview
Financial Programs: Guide for Alberta Exporters
Strategies for Success: Alberta Exporter's Guide

Alberta Labour
9940 - 106 Street
Edmonton, AB
T5K 2N2
Telephone: 427-8848

Offices are also in Calgary, Camrose, Edson, Fort McMurray, Grande Prairie, Lethbridge, Medicine Hat, Red Deer and Vermilion.

Industry and Science Canada
Consumer Affairs
10225 100 Avenue
Edmonton, AB
T5J 0A1
Telephone: 495-2485
Fax: 495-6451

or

301, 510 12 Avenue SW
Calgary, AB
T2R 0H3
Telephone: 292-5604
Fax: 292-6175

International Trade Centre
(Government of Canada)
Business Service Centre
11th Floor, 510 5th Avenue SW
Calgary, AB
T2P 3SZ
Telephone: 292-4575
Fax: 292-4578

or
540, Canada Place
9700 Jasper Avenue
Edmonton, AB
T5J 4C3
Telephone: 495-2944
Fax: 495-4507

National Film Board of Canada (NFB)
The NFB has numerous films and videotapes that may be suitable for Management and Marketing. For a lising of NFB films and videotapes indexed by title, subject and director, or for rental or purchase of NFB films and videotapes, call 1-800-267-7710 (toll-free).

Educational Marketing Officers in Calgary and Edmonton are available, province wide, for workshops, conferences, professional development days and similar activities. For northern Alberta and the Northwest Territories, the Educational Marketing Officer can be reached at 495-3012 (fax, 4956412). For southern Alberta, contact the Educational Marketing Officer at 292-5411 (fax, 292-5458).

ACCESS Network and some school boards have acquired duplication rights to some NFB videotapes. Please consult the relevant catalogues in your school or school district.

The Calgary Public Library has a selection of NFB films and videotapes that can be borrowed free of charge with a Calgary Public Library borrower's card. For further information, contact:

Calgary Public Library
Films and Recordings Department
616 Macleod Trail SE
Calgary, AB
T2G 2M2
Telephone: 260-2781
Fax: 292-5458

Resource Centres

Urban Resource Centres

Calgary Board of Education
Supervisor, Education Media
3610 9 Street SE
Calgary, AB
T2G 3C5
Telephone: 294-8540
Fax: 287-9739

Calgary Separate School Board
Supervisor, Instructional Materials
6220 Lakeview Drive SW
Calgary, AB
T3E 5T1
Telephone: 246-6663
Fax: 249-3054

County of Strathcona
Director, Learning Resource Service
2001 Sherwood Drive
Sherwood Park, AB
T8A 3W7

Edmonton Public School Board
Learning Resource Consultant
Centre for Education
One Kingsway Avenue
Edmonton, AB
T5H 4G9
Telephone: 429-8320
Fax: 429-8318

Lakeland School District No. 5460
Area Superintendent
Postal Bag 1001
6005 50 Avenue
Bonnyville, AB
T9N 2L4
Telephone: 826-3145
Fax: 826-4600

Medicine Hat School District No. 76
IMC Manager
601 1 Avenue SW
Medicine Hat, AB
T1A 4Y7
Telephone: 526-1323
Fax: 529-5339

Red Deer Public School Board
Coordinator of Instruction
4747 53 Street
Red Deer, AB
T4N 2E6
Telephone: 343-1405
Fax: 347-8190

St. Anthony's Teacher Centre
Supervisor, Curricular Resources
10425 84 Avenue
Edmonton, AB
T6E 2H3
Telephone: 439-7356
Fax: 433-0181

Regional Resource Centres

Zone I
Zone I Regional Resource Centre
Film Supervisor
10020 101 Street
P.O. Box 6536
Peace River, AB
T8S 1S3
Telephone: 624-3187
Fax: 624-5941

Zone II and III
Central Alberta Media Services (CAMS)
Film Supervisor
182 Sioux Road
Sherwood Park, AB
T8A 3K5
Telephone: 464-5540
Fax: 467-5469

Zone IV
Alberta Central Regional Education Services (ACRES)
Operations Manager
Box 1000
Parkland Regional Library Building
5404 - 56 Avenue
Lacombe, AB
T0C 1S0
Telephone: 782-3850
Fax: 782-4650

Zone V
South Central Alberta Resource Centre (SCARC)
c/o Golden Hills Regional Division
435 A Hwy #1
Strathmore, AB
T1P 1J4
Telephone: 934-5028
Fax: 934-5125

Zone VI
Southern Alberta Learning Resource Centre (SALRC)
Film Supervisor
Provincial Government Administration Building
120, 909 Third Avenue North
Box 845
Lethbridge, AB
T1J 3Z8
Telephone: 320-7807
Fax: 320-7817

Statistics Canada
Regional Office
8th Floor, Park Square
10001 Bellamy Hill
Edmonton, AB
T5J 3B6
Telephone: 495-3023
Fax: 495-5318

PROFESSIONAL ASSOCIATIONS

Alberta Teachers' Association
Specialist Council
(Alberta Teachers' Association)
Barnett House
11010 142 Street
Edmonton, AB
T5N 2R1

OTHER AGENCIES

Fututre Entrepreneurs of Canada Association
c/o Susan Alexander, President
Lord Beaverbrook High School
9019 Fairmount Dr. SE
Calgary, AB
T2H 0Z4
Phone: 259-5585
Fax: 252-8392

Annual Competition–includes marketing and entrepreneurship competitive events. Held each May at SAIT

Alberta Debate and Speech Association
202, 17308 108 Avenue
Edmonton, AB
T5X 3Y8
Telephone: 484-7929
Fax: 484-2710

Alberta Foundation for Economic Education
901, 10179 105 Street
Edmonton, AB
T5J 1E2
Telephone: 421-9331
Fax: 426-2987

The Chartered Banks and Canada's Economy
Labour in the Canadian Economy (teacher resource)
Retail Marketing in Canada
Using Money Wisely.

Canadian Co-Operative Association
400, 275 Bank Street
Ottawa, ON
K2P 2L6

Cooperative Entrepreneurship: A Case Study in Worker Ownership

Canadian Foundation for Economic Education
501, 2 St. Clair Avenue West
Toronto, ON
M4V 1L5
Telephone: (416) 968-2236
Fax: (416) 968-0488

Entrepreneurship: A Primer for Canadians (teacher resource)
Labour Market: Teacher's Resource Package (teacher resource)
Money and Youth
Women in the Work Force.

The Conference Board of Canada
255 Smyth Road
Ottawa, ON
K1H 8M7
Telephone: (613) 526-3280
Fax: (613) 526-4857

Economic Forecast: Provincial Outlook (research reports, personalized information services).

Harmony Foundation of Canada
P.O. Box 4016, Station C
Ottawa, ON
K1Y 4P2
Telphone: (613)230-7353

Junior Achievement of Northern Alberta
22, 10210 117 Street
Edmonton, AB
T5K 1X6
Telephone: 482-7521
Fax: 488-5924

Junior Achievement of Southern Alberta
739 10 Avenue S.W.
Calgary, AB
T2R 0B3
Telephone: 237-5252
Fax: 261-6988

Programs include

Business Basics (Grade 6)
Economics of Staying in School (Jr. High)
Project Business (Grade 9)
Applied Economics (Senior High)

Materials are available only where Junior Achievement has identified community business consultants and provided inservice.

Rural Education and Development Association
14815 119 Avenue
Edmonton, AB
T5L 2N9
Telephone: 451-5959
Fax: 452-5385

List of speakers for schools
Several modules on cooperatives and entrepreneurship
Teacher resource package on cooperatives.

DISTRIBUTOR DIRECTORY

The entries in the distributor directory are arranged alphabetically by code.

CODE	Distributor/Address	Telephone
ACC	ACCESS Network 3270 76 Avenue Edmonton, AB T5B 2N9	(403) 440-777 1-800-252-9363
HBC	Harcourt Brace and Company, Canada formally HBJ Holt and Holt, Rinehart and Winston 55 Horner Ave. Toronto, ON M8Z 4X6	1-800-387-7278 (416) 255-4491 (416) 255-5456 Fax
LRDC	Learning Resources Distributing Centre 12360 142 Street Edmonton, AB T5L 4X9	(403) 427-2767
MAG	Magic Lantern Communications Ltd. 775 Pacific Rd. Junit 38 Oakville, ON L6L 6M4	(416) 827-1155
RKMC	RK Media Consultants 107 Berkley Road Cambridge, ON N1S 3G8	(519) 622-5285 (519) 622-5266 fax

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The **Management and Marketing Communication Network**, with 249 members in August 1994, received draft copies of the curriculum as it was developed.

The **Career and Technology Studies Advisory Committee** provides recommendations for all CTS curricula. Membership on the committee has changed over time; below is a complete list of members.

Wayne Bakker	Alberta Teachers' Association Representative
Mike Blackwell	Wetaskiwin Composite High School
Susan deWijk	Lester B. Pearson Senior High School, Calgary
Lynne Duigou	St. Francis of Assisi School, Edmonton
Barry Edgar	Grande Prairie Composite High School
George Hildebrandt	Westview Secondary School, Calgary
Gerry Hunt	Eastglen Composite High School, Edmonton
Kenneth Jacknicke	Post-secondary Education Representative
Graham Johnston	Northern Alberta Institute of Technology, Edmonton
Bev Klemen	W. R. Myers High School, Taber
Arnold Krause	Department of Education, Culture and Employment, Government of NWT
Len Luders	Red Deer School District No. 104
Eva-Jane Lundgard	Edwin Parr Composite Community School, Athabasca
Gordon Murray	Bellrose Composite High School, St. Albert
Sam Perverseff	Alberta Teachers' Association Representative
Connie Peters	Vincent J. Maloney Junior High School, St. Albert
Darren Reeder	Business/Industry Representative
Rick Roman	MLA Implementation Team: Business Involvement Advisory Group
Barry Stangeland	Roland Michener High School, High Prairie
Gordon Welch	CASS Representative
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The **Focus Group** provided valuable advice on development, validation and implementation of the Management and Marketing curriculum.

Brett Bain	Enterprise Markets Division, Apple Canada Ltd.
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Mel Fisher	Lethbridge Regional Office of Education
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Karen Karpuk	Southern Alberta Institute of Technology, Calgary
Vicki Kranenburg	Junior Achievement of Southern Alberta, Calgary
Vi Liviniuk	Dr. E.P. Scarlett High School, Calgary
Sheila Murphy	Henderson College of Business Ltd., Calgary
Terry Royer	The Relax Group of Companies, Calgary

The **Resource Review Subcommittee** also provided valuable input.

Mel Fisher	Lethbridge Regional Office of Education
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Dale Johnston	Seba Beach School
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Teachers from across Alberta participated in the field reviews of the Management and Marketing strand.

1992–93 Field Review

Sam Belcourt	Memorial Composite High School, Stony Plain
Peter C. Doonanco	Glendon School
Dal Johnston	Seba Beach School
Allan Leinweber	William E. Hay Composite High, Stettler
Ken Loose	Assumption School, Grande Centre
Mary Pizzey	Lindsay Thurber Composite High, Red Deer

1993–94 Field Review

Glenn Lee	Bev Facey Composite High School, Sherwood Park
Bill Schlacht	Ardrossan Junior/Senior High School
John Smyk	Archbishop O'Leary High School, Edmonton

1994–95 Field Review

Gord Atkinson	Hillside Junior/Senior High School, Valleyview
Linda Carver	Strathmore High School
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Jack Hilker	Breton High School
Norm Martin	Brebeuf Junior High School, Calgary
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Richard Schear	Blackfalds School
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